TeamSite 4.5.1 Guide

version 2, April 17, 2002

CHANGE LOG

April 17, 2002

Removed Creative Works, Images, Places, and Sound Recordings from list of personalization choices for Resource Type (“26 Resource Types,” p. 64)

April 3, 2002

Revised note about careful file selection when setting metadata to account for change that allows existing metadata to be preserved (“Setting metadata,” p. 23)

Added examples of other file types to discussion of titles for non-HTML files (“Title field,” p. 48)

Added description of how metadata form handles existing metadata when multiple files are selected (“Files with existing metadata,” p. 58)

March 6, 2002

Added note about responsibility of POC Author to set metadata (“POC Author,” p. 6)

Added note about responsibility of POC Editor to check for metadata (“POC Editor,” p. 6)

Revised reminder about not sharing username and password (“Connecting to TeamSite,” p. 8)

Revised LaunchPad configuration discussion to include setup for style sheets (“Configuring LaunchPad,” p. 10)

Added brief description of New File menu item (“What the POC Author sees,” p. 14)

Added note about not being able to edit files in preview (“What the ATG Editor sees,” p. 18)

Added note about using overwrite when importing files (“Importing new files into TeamSite,” p. 21)

Added information about editing non-HTML files (“Editing other types of files,” p. 22)

Added information about using Edit File to completely replace file content (“Replacing an entire file,” p. 23)

Deleted text about red arrow marking fields with incorrect metadata (“Setting metadata,” p. 24)

Clarified that for submit to work, all boxes in the Submit window must have comments ("Submitting a file," p. 25)

Added information about check for whether files being submitted belong to another job ("Submitting a file," p. 25)

Revised to state that TeamSite returns to Workarea view (not To-Do list) after file submission ("Results," p. 27)

Added instructions on deleting files ("Deleting files," p. 28)

Added note clarifying that metadata only needs to be set once ("Modifying files in a job," p. 33)

Revised description of how to end a job in Preview ("ATG Editors," p. 39)

Added information on using the metadata reference, and providing the correct URL ("Using the metadata reference," p. 46)

Added information about web page for generating publication IDs, and removed old information about manually constructing them ("Publication ID and Sort Order fields," p. 49)

Added note about selecting subjects from list instead of typing, to avoid errors ("Subject field," p. 51)

Added paragraph explaining that programs are listed under official names, and metadata reference can be used to find the correct name ("ED Program field," p. 52)

Added note about most resources belonging to the "Textual Works" category ("Resource Type," p. 53)

Deleted two resource type suggestion for POC home pages ("Resource Type," p. 53)

Added note about not changing content date when archiving ("Next Archive/Update Date and Action fields," p. 56)

Added phone extension for Paul Stankus (Appendix A, p. 60)

Changed OERI POC Editor to Linda Darby (Appendix A, p. 61)

Changed OM POC Editor to Malina Jacobowitz (Appendix A, p. 61)

Changed OVAE WSG Editor to Deirdre Gilligan (Appendix A, p. 62)

October 15, 2001

Version 2

Revised definitions of task and job ("Summary of major changes in TeamSite 4.5.1," p. 4)

Added descriptions of File, Edit, and View menus to To-Do list discussion ("What the POC Author sees," p. 11)

Added descriptions of File, Edit, and View menus to Workarea discussion ("What the POC Author sees," p. 13)

Revised discussion of View File to mention how to view file in the browser ("What the POC Author sees," p. 14)

Revised file naming rules by adding that underscores can be used in place of spaces, and adding suggestion that file names be all lowercase ("Creating a new file," p. 19)

Updated screen shot of metadata in HTML file ("Modifying existing files," p. 20)

Updated description of metadata verification process ("Setting metadata," p. 21)

Corrected and colorized example of arrow that indicates a field with incorrect metadata ("Setting metadata", p. 22)

Revised and expanded instructions for writing a job description to be consistent with TeamSite Tip #5, and to explain why the requested items should be included ("Job description," p. 23)

Revised description of prohibited characters in job description to give correct list of problem characters and to explain that the characters cause an invalid workflow error when submitting a job ("Job description," p. 23)

Added sentence about use in file reversion to instructions for file comments ("Individual file comment," p. 24)

Revised explanation of why metadata is copied into HTML files ("What is metadata," p. 25)

Added sentence about internal metadata page at http://www.ed.gov/internal/EDWebMetadata/ ("What is metadata," p. 25)

Added table listing required metadata elements ("Metadata elements," p. 26)

Removed outdated metadata form screen shot ("Metadata elements")

Updated description of Help field on metadata screen ("Help," p. 26)

Updated description of Use Preferences field on metadata form (“Use Preferences fields,” p. 27)

Added warning about need to provide correct Identifier (“Identifier field,” p. 27)

Added information about dynamic pages using title as link text (“Title field,” p. 27)

Added paragraphs about 255-character limit on title, recommended limits on title length, and using most specific terms first in title (“Title field,” p. 27)

Added paragraph on titles for non-HTML files (“Title field,” p. 28)

Added paragraph about 512-character limit on description (“Description field,” p. 30)

Added paragraph about assigning "Offices" and "Indexes" resource types to office home pages (“Resource Type,” p. 33)

Expanded description of Content Date to be more specific about when it should be updated (“Content Date,” p. 34)

Revised description of Contact Owner to Validate or Update to explain validation, mention that Content Date should be updated when item is validated (“Next Archive/Update Date and Action fields,” p. 35)

Added to Archive Item Automatically description of use for immediate archiving (“Next Archive/Update Date and Action fields,” p. 36)

Added paragraph about Status field (“Status,” p. 36)

Added detailed description of copying metadata (“Using existing metadata in a new file,” p. 37)

Added URL for Dr. HTML (“Review the files and metadata,” p. 40)

Added updated screen shot of file properties window (“Review the files and metadata,” p. 41)

Added reminder that reviewer should check for correct Identifier (“Review the files and metadata,” p. 41)

Added updated screen shot of task details window (“Modifying files in a job,” p. 42)

Added paragraph about renaming files from the To-Do list (“Modifying files in a job,” p. 42)

Replaced description of getting to workarea to add or edit metadata with simpler method (“Modifying files in a job,” p. 42)

Added section about adding and removing files ("Adding and removing files in a job," p. 43)

Added suggestion about Transition Comment for posting approval ("Approving the job," p. 46)

Added sentence about using "Path" link to get to workarea for setting metadata ("Resubmitting rejected jobs," p. 46)

Added sentence about possible posting problems when submitting new job with rejected files ("Resubmitting rejected jobs," p. 47)

Revised language about partial approves and rejects ("Partial approves and rejects," p. 47)

Adding sentence noting that ATG Editors review and modify jobs in the same way as other Editors ("ATG Editors," p. 48)

Added paragraph about preview time limit ("ATG Editors," p. 50)

Added paragraph about not editing files in Preview ("ATG Editors," p. 50)

Added new section on managing and tracking jobs using email and the To-Do list ("Managing and tracking jobs," p. 50)

Changed OCIO POC Editor to Dawn West (Appendix A, p. 55)

Changed OSFAP POC Editor to Will Handley (Appendix A, p. 55)

Added WSG Editor listing for ACSFA (Appendix A, p. 56)

Added backup editors to WSG Editor listing (Appendix A, p. 56)

August 8, 2001

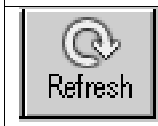
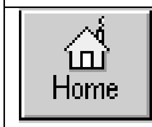
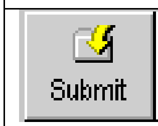
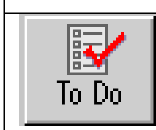
Version 1
First posting

OVERVIEW

TeamSite is a browser-based Content Management Tool used to publish web pages and other documents for the U.S. Department of Education to the main website located at http://www.ed.gov. Users within the Department can create and modify content in their own work areas and start workflow processes that ensure that documents meet quality control guidelines before they are published to the live site.

The previous version of TeamSite used by the Department was version 3.1. In conjunction with the launch of the redesigned ED web site, TeamSite 4.5.1 was installed in July 2001. Users of the previous version will find the new version very familiar, but there are a few significant differences, which will be discussed in detail in this guide.

Summary of major changes in TeamSite 4.5.1

New Feature		*Description*
	Refresh Button	Refreshes current window so that user can see updated content. The user no longer needs to find the folder in the list on the left to refresh the listing.
	POC Editor	This is a new workflow role in TeamSite that allows a senior user in the POC to coordinate the actions of the POC Authors (see "POC Editor role," p. 5).
	Set Home Page	Authors have been given the ability to set their own home page in TeamSite, allowing them to set their own POC workarea, or any folder inside it, as the startup screen.
	Author Submit	Authors now **Submit** their completed files instead of using **Mark Done** to send files forward in the workflow process.
	Set Metadata	Users in TeamSite will use this button to add Metadata to files so that the search engines will find content more efficiently (see "Setting metadata," p. 23).
	Group Assignments	When files are Approved by a POC Editor, they are assigned to a group of WSG Editors instead of an individual person. This allows either the primary or backup person to work on the files. Similarly, when files are Approved by a WSG Editor, the files are assigned to a group of ATG Editors.
	To-Do list	The To-Do list keeps track of tasks and jobs in the workflow. A task is any individual action taken on a file, such as approving the file for posting. A job is the set of tasks that are required to get a file or group of files from the beginning of the workflow to the end.

Most of the changes listed above are fairly self-explanatory, but two, metadata and the POC Editor role, will require more discussion.

Metadata

The new version of TeamSite allows authors and editors to add metadata to files on the website. Our new website uses this extra information about each file in a variety of ways. For instance, when a user personalizes the website, the metadata is used to narrow the content the website displays to the kinds of things the user is interested in. Metadata also will allow search engines to work more efficiently by moving the most relevant items to the top of a search result list. We'll discuss the use of metadata in detail in the "Metadata" section of this guide.

POC Editor role

In the new version of TeamSite, we've added the role of POC Editor to the workflow. Within TeamSite, workflow is how a file moves from one person to another, gets approved or rejected, and finally makes it to the live site. We're used to a workflow in which a file starts with a POC Author, moves on to a Web Services Group (WSG) Editor, moves on to an ATG Editor, who is an employee of the Department's Internet contractor, and arrives at the live site. In the new workflow, a file now moves from POC Author to POC Editor to WSG Editor to ATG Editor to the live site.

The POC Editor reviews content from the POC Authors in his or her POC and sets priorities for work, as well as ensuring that content has been properly cleared within the Department. With the addition of POC Editor role, there will now be one person in the POC who will know about the web work of all the parts of the POC—for some POCs, only the WSG editors have had this information in the past.

The new role will also make it easier for POCs to share the burden of work in TeamSite. In the old system, the only way for one person in a POC to see all of that POC's TeamSite postings was for that person to be the only TeamSite user in the POC. With the new system, one person acts as the POC Editor, and there are multiple Authors from the POC working in TeamSite. The work of all those POC Authors will pass through the POC Editor.

Because POC Editors see everything being submitted from their POC, they can decide which postings have a higher priority, instead of having WSG staff guess at which one is most important. The POC Editors can also ensure that all web postings have the proper clearance, as required by their POC.

A list of POC Editors can be found in Appendix A.

TeamSite roles and responsibilities

With the addition of the POC Editor role, there are now four specific roles in the ED TeamSite workflow. Each role has a different set of abilities and responsibilities.

POC Author

- A POC Author is the originator or content owner of web pages. A POC Author will work in an ED principal office.
- A POC Author can edit existing pages in his or her assigned "work area."
- POC Authors can move and rename files.
- POC Authors can also create new HTML files or import new files to their assigned work area. They can import source files that need to be marked up to a temporary folder.
- POC Authors are required to set metadata on the new files they create within TeamSite.
- To get pages published to the live ED website, POC Authors must submit pages to a POC Editor.

POC Editor

- POC Editors work in an ED principal office.
- POC Editors can do all the things that POC Authors can do.
- POC Editors can approve files and send them on to WSG, or they can send files back to POC Authors for additional work.
- POC Editors can delete files from the workarea, but not the live site.
- POC Editors are responsible for making sure files have proper clearances, assigning priorities to web work, and verifying that metadata was set on submissions from POC Authors.

WSG Editor

- WSG Editors will be Web Services staff.
- Like POC Authors and POC Editors, WSG Editors can create, import, edit, move, and rename files. Like POC Editors, they can delete files from a workarea.

- WSG Editors make sure that files submitted by POC Editors are fully functional, and verify that internal and external links work. This includes reviewing the technical accuracy of the HTML markup, standards compliance, metadata, and other criteria.
- WSG Editors can approve files and send them on to the Internet contractor for posting, or they can send files back to POC Editors for additional work.

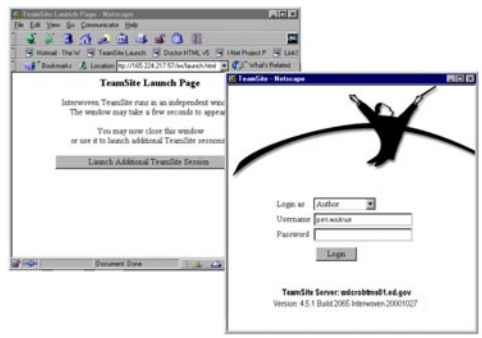
ATG Editor

- The ATG Editors and Administrators are members of the web support contractor staff.
- Like the other Editors, ATG Editors can create, import, edit, move, and rename files. They can delete files both from workareas and from the live site.
- The ATG Editors receive and coordinate the work from WSG Editors, ensure that all HTML satisfies the technical requirements necessary for inclusion on the live website, and post the content to either preview or the live site.
- ATG Editors will either markup source files or review the HTML files submitted by POC authors and WSG editors to verify that there are no broken links on the files and ensure correct placement.
- The Administrator has server level access to the server and is responsible for overall system administration and configuration issues.

Getting started

There are four main parts to TeamSite, which must be installed and configured. These are: a browser (Netscape or Internet Explorer), an HTML editor (HomeSite, Dreamweaver, etc.), an application called LaunchPad (which installs when TeamSite is launched for the first time), and an email program (Outlook) to receive notification when workflow tasks are completed. A table listing the minimum and recommended versions of the software will be provided in a separate Appendix. If you need any items from the list, please contact your WSG Editor (the list of Editors is in Appendix A.)

Connecting to TeamSite



1. Open up your Netscape or Internet Explorer browser and type the URL: http://tms01.ed.gov/iw/launch.html. You might find it useful to set this as a bookmark or a favorite in your browser.

2. A second window will open. The first time you connect to TeamSite, a message will appear asking to install software (LaunchPad) on your machine.

   Netscape Users: Click the checkbox next to "Grant Interwoven the ability to install files on your PC…" and then click **OK**. When the software starts to install click **Next**. Allow LaunchPad to install in its default location.

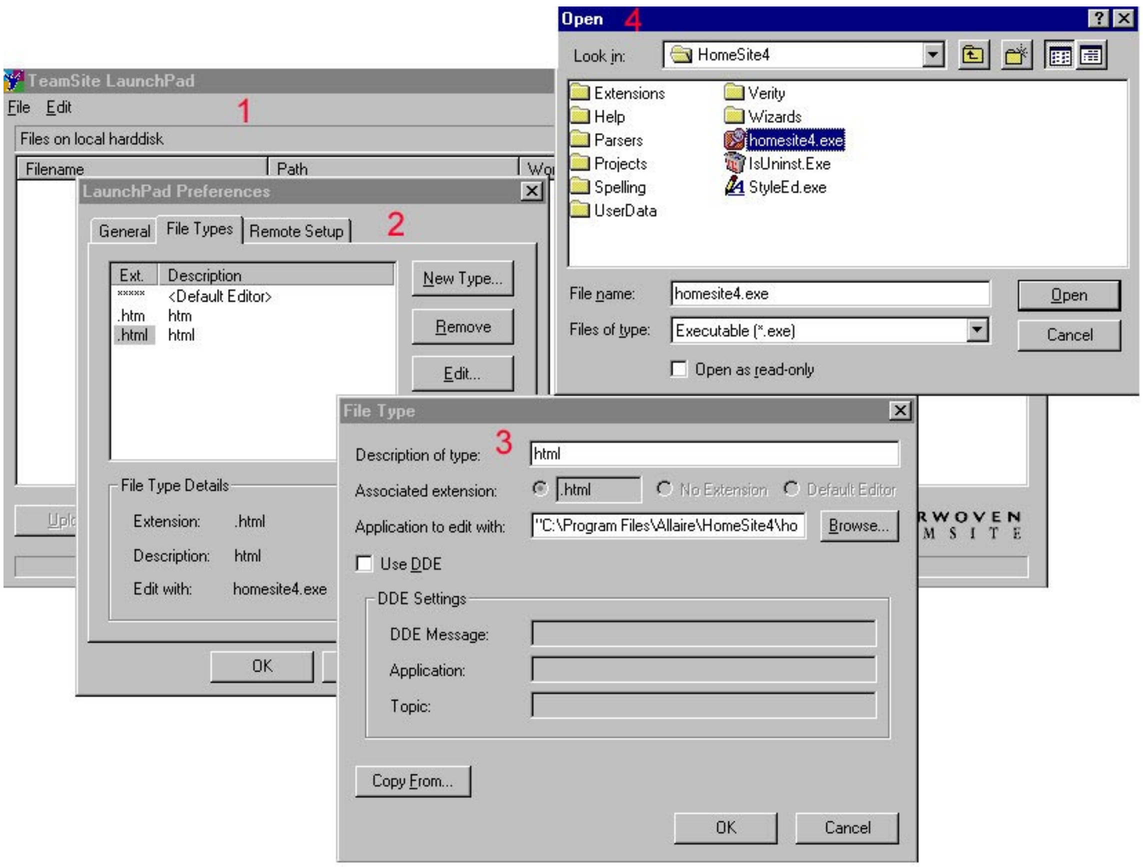
   IE Users: The IE message will ask you "Do you want to install and run…" Click the checkbox next to "Always trust content from Interwoven" and click **YES**. LaunchPad will begin to install after a minute or so.

3. Once the software has been installed, the second window that opened will show three new boxes: Login as: (Author, Editor, Admin, Master), Username, and Password. For Login as, select your role (author or editor) from the pull down menu. Next, type your username in the second box. Your username should be all lowercase and will have been sent to you by the TeamSite system administrator. In the third box, type your password. Please remember that passwords are case sensitive. If you have trouble connecting, please make sure that the caps lock key is off and try again. If you still can't connect, please contact the help desk at the number provided in Appendix A.

NOTE: For security reasons, do not share your username and password with **anyone**. If any work comes through the system with your username, it will be assumed to come from you, and any violations of Department policies and practices will be handled accordingly.

Configuring LaunchPad

You must configure LaunchPad to point to your HTML editor of choice before you can edit files in TeamSite. You will only need to do this once.



1. Go to the Start Menu in the bottom left corner of the PC and find Programs —> Interwoven—>LaunchPad.

2. Open up LaunchPad. From the **File** menu, select **Properties**. A new window called "LaunchPad Preferences" will open. Click on the **File Types** tab.

3. Click on the ***** next to default editor and click the **Edit** button. A new window will open. Click the **Browse** button, which is to the right of the

"Application to edit with" box. A third window will appear. Navigate to the location where your HTML editor is installed and select the executable program (.exe). (For example, HomeSite's program is located at the following path on most PCs: C:\Program Files\Allaire\Homesite\Homesite45.exe) After you are finished, click **Open**, then **OK**. You will return to the first screen.

4. Select **New Type**. A new window opens where you'll need to enter information about the type of file to be edited. In the "Description" area in this window, insert "htm" (no quotes). Next to Associated extension, type ".htm" Click on **Browse**, and your HTML editor's .exe file should be in the window. Click **Open**, then click **OK** and return to the first screen.
5. Repeat Step 4 with "html" and ".html" as well as "css" and ".css" if you are using style sheets. When you have verified that all three, <default> <htm> and <html>, and (optionally) <css>, have your HTML editor selected as the default, click on **OK** to save your settings and close the LaunchPad Preferences window.

Configuring LaunchPad to automatically delete temporary files

This simple tip will keep you from saving old copies of the files on your local hard drive and help make sure that you are always working with the most recent version of a file in TeamSite. It will also keep TeamSite from cluttering up your drive with extra files. To activate this setting:

- Open LaunchPad, and select **Properties** from the **File** menu.
- Click on the **General** tab if that isn't already showing.
- Under the sentence that says "What to do with the temporary local files after uploading them", click the button next to **Always Remove**.
- Click **OK** to save this change and close Properties.

Setting the home page

For POC Authors, most work will be done in the Workarea view, and probably in a specific folder in the workarea— so it makes sense to set the home page to the folder where you'll normally start your work. Other users may also want to set their home to a location in the workarea they use the most.

Click on the **Workarea** button to switch to the Workarea view. The list of workareas you have access to will appear in the window. Navigate to the folder you want to have as your default home page by clicking on the folders. Once you're in the right place, select **Set Homepage** from the **Edit** pull-down menu. Now you can always get back to this location by clicking the **Home** button. Also, if you have no items on your To-Do list, TeamSite will start out in this folder when you first log in.

Tour of TeamSite

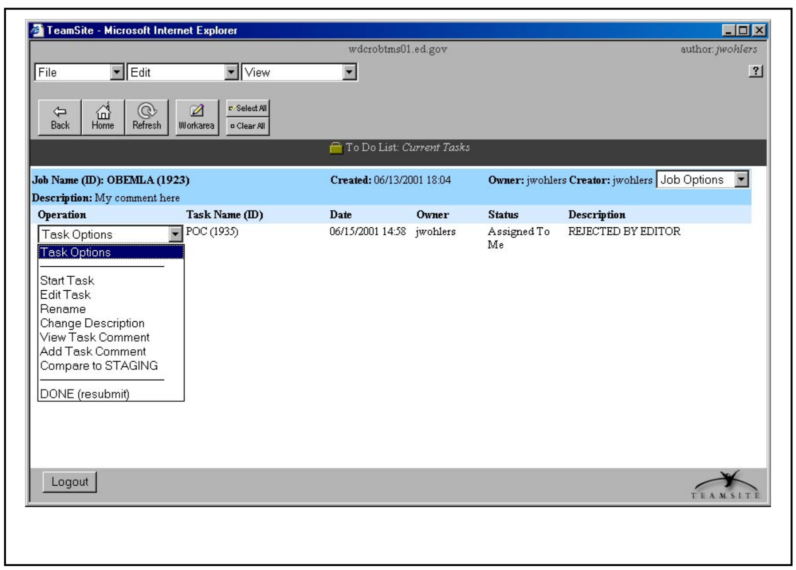
There are two main views you'll be using in TeamSite: the To-Do list and the Workarea. These will look and be used slightly differently depending on your TeamSite role. For example, a POC Author will have different screens (and more limited available features) than a POC Editor.

What the POC Author sees

To-Do list

When the POC Author logs into TeamSite for the first time, the first screen he or she sees is the To-Do list.

> **TIP:** In most cases, POC Authors should set their home page within their workarea as they will only use the To-Do list when a job is rejected, and not on a regular day-to-day basis. See "Setting the home page" above for information on how to do this.



There are three pull-down menus at the top of this screen, **File**, **Edit**, and **View**. Many of the items in the three pull-down menus don't do anything useful in the To-Do list view. However, some of the **View** menu options are very important when you're working with TeamSite jobs (see "Managing and tracking jobs," p. 41).

There are seven items on the **File** menu. Only three are of interest on the To-Do list: **Change Directory**, **Change Password**, and **Logout**.

- **Change Directory** allows you to go directly to any folder in TeamSite by typing the path to that folder. However, for most users, it will be easier to get to the folder by switching to the Workarea view and navigating through the folders.

- **Change Password** lets you change your TeamSite password. This is also the password you use to access the TeamSite files through FTP, so if you need to update your password for FTP access, you can do it from here. Some special characters (such as ~ ` & ( ) = [ ] ' ") can't be used in the password, because TeamSite reserves those characters for its own use. You can use any letters or numbers, and also the following special characters: ! @ # $ % ^ * _ - + ? .

- **Logout** lets you end your TeamSite session without quitting the browser.

Of the five items on the **Edit** menu, only **Set Home Page** and **LaunchPad Setup** can be used from the To-Do list view. Set Home Page lets you set your TeamSite home page (see "Setting the home page," p. 10 for details). **LaunchPad Setup** takes you to the instructions and links for installing LaunchPad manually, which can be useful if you need to reinstall LaunchPad for some reason.

There are seven items on the **View** menu in the To-Do list: **Current Tasks**, **Unassigned Tasks**, **My Jobs**, **All Jobs**, **Home Page**, **Workarea**, and **Refresh**. **Unassigned Tasks** doesn't do anything useful for a POC Author.

- **Current Tasks** shows the default To-Do list view; in general, the jobs listed here are those assigned to you. For POC Authors, the items on the list will be jobs that were rejected by an Editor and sent back to be fixed.

- **My Jobs** lists all the jobs currently in TeamSite that were started by you. You can use this listing to find out the status of your jobs, or to remove a job if there's a problem with it. (See "Managing and tracking jobs," p. 41 for more information.)

- **All Jobs** lists all the jobs currently in TeamSite.

- **Home Page** takes you back to the home page you selected. (See "Setting the home page," p. 10 to find out how to set your home page.)

- **Workarea** takes you to the Workarea view.

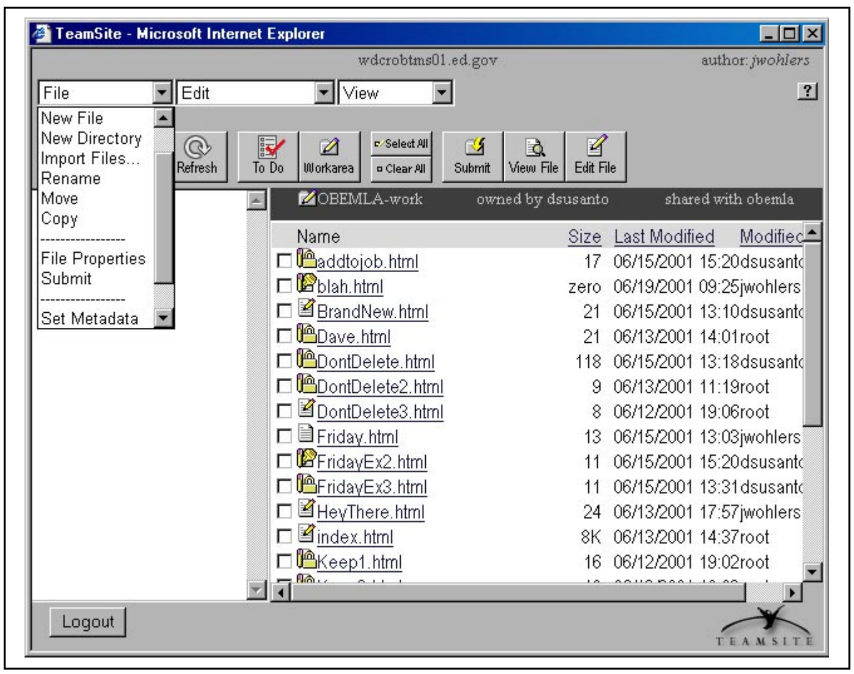
- **Refresh** updates the current window with any changes you've made.

There are also six buttons at the top of the To-Do list: **Back**, **Home**, **Refresh**, **Workarea**, **Select All**, and **Clear All**. The **Back** button operates just like a browser's back button, taking you to the previous screen. The **Home** button takes you to your TeamSite home page. **Refresh** and **Workarea** do the same thing as the **View** menu items with the same names. **Select All** and **Clear All** don't do anything useful in the To-Do list.

POC Authors will only have jobs listed on the To-Do list when files have been sent back to them (rejected) by the POC Editor for further revisions. So as a POC Author, your To-Do list will usually be empty. If you do have a job that was rejected by a POC Editor, your To-Do list will look like the one in the screen shot on p. 10 above.

There are two pull down menus next to each job listing: **Task Options** and **Job Options.** We'll be discussing the items from these menus you'll want to use later in the "File Review Process" section of this guide.

Workarea



To switch to the Workarea view from the To-Do list, click on the **Workarea** button (or you can click the **Home** button if you've set your home page). In the Workarea view you'll see two windows: on the left is a list of all of the folders; on the right is the list of files and folders. Both views are the same and you can navigate through either to your destination folder. However, it's usually faster to navigate through the windows on the left, because the list is shorter.

The Workarea view has the same three pull-down menus at the top as the To-Do list (**File**, **Edit**, and **View**). Many of the items are the same as in the To-Do list. For example, **Change Directory**, **Change Password**, and **Logout** are all listed on the **File** menu here, and they work the same as they do from the To-Do list.

There are eleven other items on the **File** pull-down menu in the Workarea view. The most important ones are **Import Files...**, which lets you bring files from your local hard drive (or any drive connected to your PC) into TeamSite,

Submit, which lets you send a file or multiple files forward in the workflow, and **Set Metadata**, which lets you add metadata to an existing file of any type. We discuss these three important items more in the "Submitting Files for Posting" section of this guide.

- **New File** lets you create a new file within TeamSite. In general, though, we recommend that you create the file on your computer first, and then use **Import Files...** to bring the file into TeamSite. (See "Creating a New File," p. 20.)

- **New Directory** lets you create a new folder. Just go to the folder where you want your new folder to be, select **New Directory**, and TeamSite will give you a dialog box to type the name for the new folder. You must be very careful in naming the new folder; the folder name can't have any spaces in it, and most punctation characters can't be used either (underscores and hyphens are okay).

- **Rename** lets you change the name of a file. You may want to use this option if you realize that you used an incorrect file name after you import a file. Select the file to be renamed by clicking in the box to the left of the name, then select **Rename** from the **File** menu. You'll get a dialog box where you can enter the new name for the file. Please see "Creating a new file," p. 20 for a list of restrictions on file names.

- **Move** and **Copy** are similar to **Rename**, and in fact **Move** can also be used to rename a file. However, if you type a different path for the file into the dialog box, **Move** will put the file into a different location as well. For example, if the file "pub.html" is currently in /offices/OERI/, you could move it to /offices/OERI/docs/ by selecting **Move** and then typing docs/pub.html into the dialog box (you must be sure to include the file name in the path). **Copy** works just like **Move**, except that it leaves the original file in place and moves or renames a copy of the file.

- **File Properties** lists some important properties associated with the selected file or files, such as when the file was created, who holds locks on the file, and whether the file is part of another TeamSite job. It also lists the metadata associated with the file. If you have more than one file selected, **File Properties** will list the properties for each file separately in the same window.

- **Touch File** will only be useful in a few situations. TeamSite will only let you submit files for posting if the files have been modified. If for some reason you need to submit a file but you don't need to modify the file (for example, if an earlier attempt to post failed), you can use **Touch File** to make TeamSite believe that the file has been modified.

- **Adv File Props** lists the different workareas, and shows the modification date for the file you're looking at in each of the workareas. This can be useful if you're trying to figure out whether changes have been copied to preview, to the live site (STAGING), or to another workarea.

Just like the **Edit** menu in the To-Do list view, the **Edit** menu in the Workarea has **Set Home Page** and **LaunchPad Setup**; these work just like they do in the To-Do list. The other items in the Edit menu can all be used in the Workarea view.

- **Select All** selects all the items in the folder you're currently viewing (both folders and files). If you want to select all but one of the items in a folder, you can choose Select All from the Edit menu and then click the box next to the item you want to leave out to deselect that item.

- **Select All Files** selects all the files in the folder, but doesn't select the folders.

- **Clear All** deselects all the folders (removes all the checks next to the file names). You may want to use this if you want to be sure you don't have extra files selected before you do something else. For example, using **Set Metadata** on more than one file at a time will erase any existing metadata on those files; using **Clear All** before **Set Metadata** can help keep you from accidentally erasing metadata.

- **View File** opens the selected file in your HTML editor in read-only mode (you can't make changes to the file)—it doesn't open it in the browser window. If you just want to see the file in the browser, click on the file name in the window on the right.

> TIP: **View File** is helpful when you want to create a new file and use the existing file as a template. Simply select the file to be used as a template by clicking in the checkbox next to the file name. Then select **View File** from the **Edit** menu (or click the **View File** button). The file will be opened in your HTML editor; just save it locally on your PC with the name for your new file before making the changes.

- **Edit File** lets you edit existing files locally on your PC, using your HTML editor (HomeSite, Dreamweaver, etc.). See "Modifying existing files" (p. 21) for more information.

- **Edit With...,** also lets you edit existing files, but you can pick the application you'll use to edit the file. If your default HTML editor is HomeSite, you can use **Edit With...** to edit a particular file in

DreamWeaver instead. You can also use **Edit With…** to pick the correct application for editing other types of files (such as graphics or Word files).

The **View** menu in the Workarea has only four items: **Home Page**, **To Do List**, **Workarea**, and **Refresh**. **Home Page**, **Workarea**, and **Refresh** work just the same as they do from the To-Do list **View** menu. **To Do List**, obviously, takes you back to the To-Do list.

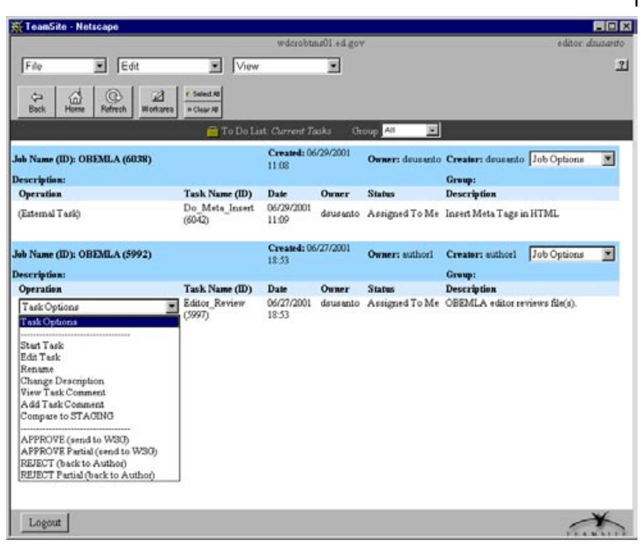
The Workarea view has ten buttons at the top. **Back**, **Home**, **Refresh**, and **Workarea** all work just the same as on the To-Do list. The remaining buttons, **To Do**, **Select All**, **Clear All**, **Submit**, **View File**, and **Edit File**, all duplicate menu items (the ones you'll probably use the most). As mentioned previously, we'll be discussing the use of Submit later in this guide; the remaining items were described above.

What the POC Editor sees

When the POC Editor logs in, the first screen he or she sees is the To-Do list, which will list all of the tasks currently assigned to him or her. When the POC Editor is reviewing files submitted by POC Authors, he or she works off the To-Do list. However, POC Editors can also start jobs themselves, just like POC Authors do.

The POC Editor's To-Do list looks the same as the POC Author's. It has identical buttons and pull down menus.

The only difference is in the contents of the **Task Options** pull-down menu in each job listing. Most of the items are the same, but the POC Editor has two items for approving jobs and two items for rejecting jobs, which the POC Author doesn't have. We'll be talking about the items on this menu and on the **Job Options** menu in more detail in the "File Review Process" section of this guide.



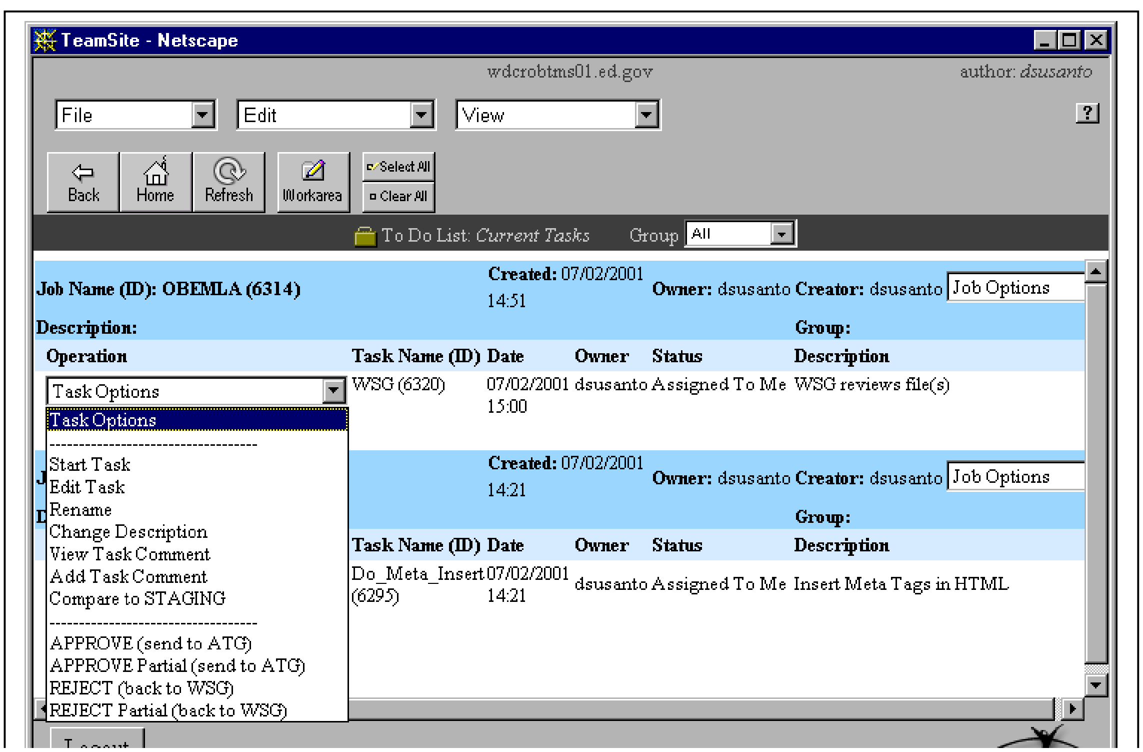
NOTE: Only two of the approval/rejection menu items work correctly. **APPROVE Partial (send to WSG)** and **REJECT Partial (back to Author)** currently have bugs in them and shouldn't be used.

POC Editors can also initiate changes and start new jobs. To do this, the POC Editor must click on the **Workarea** button and navigate to the location of the files. Then the POC Editor can do exactly the same things that POC Authors do when they make changes, and use the **Submit** button to submit the new job. As mentioned earlier, we'll be covering this in more detail in the next part of the guide.

What the WSG Editor sees

The To-Do list and Workarea views for the WSG Editor are almost identical to those of the POC Editor. The major difference is in the **Task Options** menu for individual jobs listed in the To-Do list. When a job is first sent to WSG, it is placed on the To-Do list of the appropriate WSG Editor and both of his or her backups. It isn't assigned to any of them yet, and the Task Options menu has only one item, **Take Ownership**, instead of the full set of options. To be able to examine and approve the files, one of the WSG Editors needs to select **Take Ownership** first. Then the job will be assigned to that Editor, and he or she will have the full set of options on the **Task Options** menu.

Once the WSG Editor has taken ownership, the WSG Editor has a **Task Options** menu that's very similar to the one a POC Editor sees. The WSG Editor can review tasks and edit files in the same way a POC Editor does.



Like the POC Editor, the WSG Editor can start jobs by making changes in a workarea, and then using the **Submit** button. Once again (just like the POC Editor), the WSG Editor will follow the same steps that a POC Author does in making changes, as we'll discuss shortly.

What the ATG Editor sees

ATG Editors are members of the contractor staff who give all files one final check before they are posted to the live site; they use the To-Do list to perform this review. The views that an ATG Editor sees are, as you might expect, almost identical to those the POC Editors and WSG Editors see. Once again, the only difference is in which items appear in the **Task Options** menu. Just like for WSG Editors, when jobs first come to ATG, they aren't assigned to an individual editor. To work with the job, an ATG Editor, or his or her backup, needs to select **Take Ownership** from the **Task Options** pull down menu. Then the file is assigned to that Editor, and he or she has a full set of choices from the **Task Options** menu.

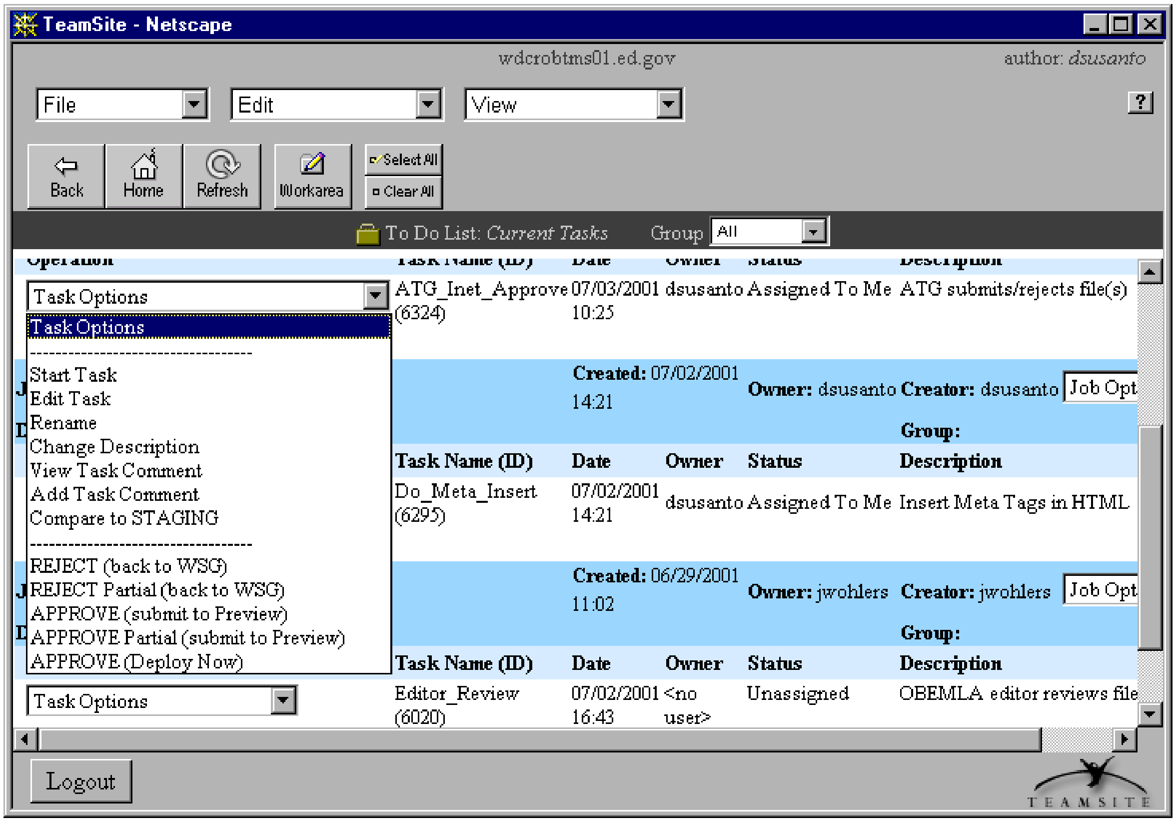
Unlike the POC Editor and the WSG Editor, the ATG Editor can send files to the live site or to preview; this is the only role that has this ability. Therefore, the ATG Editor has some special options under the **Task Options** pull down menu.

- **APPROVE (Deploy Now)** allows the ATG Editor to send the job to the live site.

- **APPROVE (Submit to Preview)** allows the ATG Editor to send the job to preview.ed.gov for further review.

> **NOTE:** If an ATG Editor approves a job to preview, the job stays on the To-Do list until it is either approved to the live site or the ATG Editor ends the job. While the job is on the To-Do list, no one can edit the files in the job.
>
> Additionally, files can't be edited in preview. Therefore, the only way to edit a file that has been posted to preview is to end the job the file belongs to and return to the workarea and edit the file there.

The ATG Editor can also send the full job back to WSG for review. For more information about the ATG Editor's role in the file review process, see "ATG Editors," p. 39.


TeamSite - Netscape
wdcrobtms01.ed.gov
author: dsusanto
File
Edit
View
Back
Home
Refresh
Workarea
Select All
Clear All
To Do List: Current Tasks
Group
All
Task Options
Start Task
Edit Task
Rename
Change Description
View Task Comment
Add Task Comment
Compare to STAGING
REJECT (back to WSG)
REJECT Partial (back to WSG)
APPROVE (submit to Preview)
APPROVE Partial (submit to Preview)
APPROVE (Deploy Now)
ATG_Inet_Approve (6324)
07/03/2001 10:25
dsusanto
Assigned To Me
ATG submits/rejects file(s)
Created: 07/02/2001 14:21
Owner: dsusanto
Creator: dsusanto
Job Opt
Group:
Task Name (ID)
Date
Owner
Status
Description
Do_Meta_Insert (6295)
07/02/2001 14:21
dsusanto
Assigned To Me
Insert Meta Tags in HTML
Created: 06/29/2001 11:02
Owner: jwohlers
Creator: jwohlers
Job Opt
Group:
Task Name (ID)
Date
Owner
Status
Description
Task Options
Editor_Review (6020)
07/02/2001 16:43
<no user>
Unassigned
OBEMLA editor reviews file
Logout
TEAMSITE

SUBMITTING FILES FOR POSTING

There are three important steps to making changes to the ED web site through TeamSite. First, you need to create the required new files or modify existing files, as appropriate. Second, you need to set the metadata for the files you created or changed. And finally, you need to submit your file or files for posting through TeamSite.

Creating a new file

Although you can start the file creation process from within TeamSite, we recommend that you start by creating the file on your local drive with the appropriate editor. For example, if you want to create a new HTML file, you'd start by opening HomeSite and creating the file. This method gives you a little more flexibility in naming and placing the file (because you don't have to make a final decision on either until you're done with the file).

NOTE: When creating files, please remember that TeamSite uses a UNIX based filesystem and has specific formats for file creation that are different than on a PC. Here are the rules for naming a file for TeamSite.

- File names must be one word, with no spaces; an underscore (_) can be used instead of spaces
- File names must have the appropriate extension
(incorrect file name: "my file"
correct file name: "myfile.html")
- File names are case sensitive (e.g. "Family.html" is different than "family.html"); using lowercase for the entire file name will reduce the risk of confusion and bad links
- Do **NOT** use any of the following characters in a file name as they are "reserved" by the operating system.
~ ` ! @ # $ % ^ & * ( ) + = ? [ ] ' "

Naming files incorrectly will often cause links to be incorrect, but some bad file names can also cause trouble for TeamSite itself, so be very sure you have named your file correctly.

Importing new files into TeamSite

Once you've created your new file, you can use **Import Files...** to bring the new file in.

1. Make sure you're looking at your workarea in TeamSite; if not, click on the workarea or home button. Open the folder that you want to place the file in.

2. Select **Import Files...** from the TeamSite File menu. LaunchPad will open, and you'll see a Select File window.

3. Select the file you created on your local hard drive. You may need to navigate to the right directory (folder) to find it. You can select multiple files within the same folder. Once you've selected the file or files, click **OK**. LaunchPad will then upload the file to TeamSite. The Select File window will disappear and you'll see your workarea again. You'll need to click on the **Refresh** button to see your new file or files listed.

> **NOTE:** Editors can also use **Import Files...** to replace existing files. In the Workarea view, Editors have a **Overwrite** button in the upper righthand corner. You can switch overwriting on by clicking on this button; then when you import a file that has the same name as an existing file, your imported file replaces (overwrites) the existing file. However, overwriting existing files in this way also overwrites the metadata on the file, removing it from the system. Therefore, you should **not** use the overwrite feature to replace files that have metadata set on them; instead, you must edit the existing file through TeamSite (see "Replacing an entire file," p. 23 for more information.)

Modifying existing files

Modifying an existing file is fairly simple in TeamSite. To edit an HTML file:

1. Put a check next to the file in your workarea and select the **Edit File** button.

> **NOTE:** You can only edit files when you're in your correct workarea. If you can't edit a file you think you should be able to, please contact the system administrator for assistance.

2. TeamSite will open LaunchPad, which will then automatically open the HTML document in your HTML editor on your local PC.

3. When you edit the file, you should be careful to only change the body of the file (the code between <BODY> and </BODY>). The new version of TeamSite will be adding meta tags and the title inside the <HEAD> of HTML files, as we'll be discussing later. You need to leave these tags alone when you're editing a file. If you do edit the title or meta tags, TeamSite will overwrite your changes.

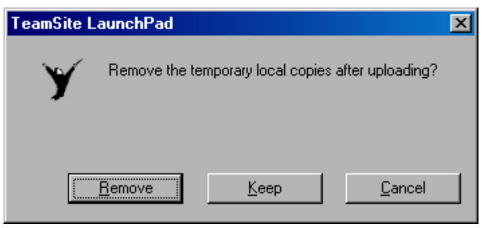
```
<html>
<head>
<TITLE>U.S. Department of Education (ED) Home Page</TITLE>
<meta name="keywords" content="U.S. Department of Education, US Department of Education, Department
<meta name="description" content="The U.S. Department of Education's (ED) mission is to ensure equ
<!--Start EDWeb Metadata - Do Not Modify Tags in Block Below-->

<meta name="DC.description" content="The U.S. Department of Education's (ED) mission is to ensure e
<meta name="description" content="The U.S. Department of Education's (ED) mission is to ensure equ
<meta name="ED.level" scheme="EDWeb" content="All">
<meta name="DC.format" scheme="IMT"  content="text/HTML">
<meta name="DC.publisher" content="US Department of Education (ED)">
<meta name="DC.title" content="U.S. Department of Education (ED) Home Page">
<meta name="DC.language" scheme="ISO 639-2" content="en">
<meta name="ED.office" scheme="EDWeb" content="Office of the Secretary (OS)">
<meta name="DC.date.valid" scheme="ISO 8601" content="2001-07-26">
<meta name="DC.subject" scheme="EDWeb" type="descriptor" content="Grants; Student Loan Programs; El
<meta name="keywords" content="Grants; Student Loan Programs; Elementary Education; Secondary Educ
<meta name="DC.subject" type="keyword" content="FAFSA; Financial Aid; Adult Education; Special Edu
<meta name="DC-ED.audience" scheme="EDWeb" content="Individuals; Teachers">
<meta name="DC.type" scheme="EDWeb" content="Other Resource Types">
<!--End EDWeb Metadata - Do Not Modify Tags in Block Above-->
</head>

<body bgcolor="#ffffff" background="icons/bg.gif" link="#336699" marginheight="0" marginwidth="0"
<script language="Javascript">
```


4. When you're finished with your changes, save and close the file.

5. Switch to your LaunchPad window, select your file, and click on the **Upload** button. If LaunchPad asks if you want to remove the temporary local files after uploading, click **Remove**. This will keep TeamSite from cluttering up your computer with unnecessary temporary files.



6. Now you can go back to the TeamSite window and view your changes. Click the **Refresh** button and then click on the name of the file, and TeamSite will display the file in your browser.

If you find you need to make more changes, you can click the checkbox next to the file name in TeamSite and select **Edit File** again. You can edit the file as many times as you wish before submitting it. However, once you submit it, TeamSite will lock the file and assign it to the next person in the workflow. You can't edit the file again until the job you submitted ends.

Editing other types of files

Sometimes you'll need to edit other types of files on the web site, such as Word files. You can use TeamSite to download and edit these files, which will preserve any metadata that has been set on the file.

1. Put a check next to the file in your workarea and select the **Edit File** button.

2. TeamSite will open LaunchPad. LaunchPad might open an appropriate editor (depending on how it is configured). If not, click on the name of the file in LaunchPad, and then click the **Edit With...** button. This lets you pick what program you want to use to edit the file.

3. Make your changes, and then save and close the file.

4. Switch back to LaunchPad, select the file you edited, and click on the **Upload** button.

5. To see if your revised file was uploaded, go back to TeamSite. Click the **Refresh** button and then click on the name of the file. TeamSite will open the file the way it normally does.

Replacing an entire file

If someone gives you a replacement file, you can use TeamSite's editing function to bring the content in. Other methods of replacing the file will remove the metadata that has been set for the file, but using **Edit File** lets you preserve the metadata.

1. Open the replacement file in your HTML editor, and select and copy all the content. Close the file (while this isn't necessary, you may find it less confusing if the two files have the same name).

2. Switch to TeamSite. Put a check next to the file and select the **Edit File** button.

3. TeamSite will open LaunchPad, which will then open the file in your HTML editor.

4. Select all the content in the file, and paste the copied content from the replacement file over it.

5. Save and close the file, and use TeamSite to upload it.

Setting metadata

Once you're done adding new files or modifying existing files, you'll need to set metadata on new files, and set or modify the metadata on existing files. You'll use **Set Metadata** from the **File** menu in the Workarea view to get started.

> **NOTE:** This section only covers the general process of setting metadata on a file, not the use of individual metadata elements. For detailed information on the individual elements, and how they should be entered into the metadata form, see the "Metadata" section of this guide, beginning on p. 45.

To set metadata on a single file:

1. Click in the checkbox next to your file, and select **Set Metadata** from the **File** menu.

> **NOTE:** Be sure that you have the right file or files selected when you use **Set Metadata**. If you have multiple files selected, you can accidentally erase existing metadata if any of those files already have metadata (see“Setting metadata on multiple files,” p. 58 for more information). You may want to click the **Clear All** button before you proceed, just to be sure you’re not including files that you don’t want to change.

2. Now you’ll see the metadata form. The required fields are marked with a red asterisk between parentheses [(*)]. You must fill in all the required fields. An existing file may already have these items filled in; if so, you don’t need to re-enter that information (but you might want to update the Content Date).

> **TIP:** If you have an existing file that already has metadata, you can take a shortcut and use the **Copy Metadata** button to copy the metadata from that file to the file you’re working with. See “Using existing metadata in a new file,” p. 58.

3. Once you’ve added all the metadata (the required items, and any additional items you wanted) you need to let TeamSite verify your entries. Scroll down to the bottom of the page and click on the button that says **Verify Entries**. Once you select **Verify Entries** a new window will appear that says, “Click Verify to check your input values...” Click **Verify** to let TeamSite check your entries.

4. If all the entries are correct, the new window will go away and the word “validated” will appear in the text box next to the **Verify Entries** button on the metadata form. If there are any invalid entries, the errors will be listed in individual pop-up windows, and the new window doesn’t close. Close the new window to return to the metadata form. Fix the fields that have errors and use the **Verify Entries** button again until all errors have been fixed.

5. Now click on the button that says **Set Metadata**. The metadata form will close, and metadata will be added for your file.

NOTE: As mentioned previously, information entered in the metadata form will overwrite changes you make to the meta tags or the title while editing the HTML file. Therefore, if you need to make changes to either the meta tags or title of an HTML page that has metadata, you need to go to **Set Metadata** to make the change, or your changes will be lost.

Submitting a file

After you have set metadata on your new or modified files, you can submit the file or files for posting to either the preview site or the live site. The submission process is very simple.

1. Click in the checkbox next to the files you want to submit.

2. Click the **Submit** button.

3. In the screen that pops up, you'll see a number of boxes that you need to fill in. The first box has the label "Submit Comment" next to it. This is where you fill in the job description (see "Job description" below); the text you put here will be used as the subject line for TeamSite emails about the job. The other boxes have the names of individual files above them; these are where you provide comments about the individual files (see "Individual file comments" below). You need to put a comment into each box, or else TeamSite won't let you submit the job. For example, if you are submitting 10 files, you'll need to fill out 11 windows—one for the job description and 10 for the individual files.

NOTE: The file comments become part of the file's history. Please use appropriate descriptive comments in the individual boxes so that you can determine what changes were made when later on.

4. When you've provided both the job description and the individual file comments, click the **Submit** button. The pop-up window should close, and your job will be submitted. When the window closes, another window will appear. If your files have all been submitted, it will say "All files submitted successfully", and you can click the **OK** button to close this window. However, if you included files that were already part of another job, those files will not be submitted with your job, and the new window will list the files that weren't submitted. You won't be able to submit those files until the previous job they belong to has ended.

Job description

As mentioned above, you need to provide a job description for each job you submit, in the box labeled "Submit Comment." This comment describes the entire job, and should contain any posting instructions for the files. The job description will be used as the subject of the emails everyone receives about the job, and will also be in the body of the email. Finally, the job description is also shown on the To-Do list within TeamSite.

It's helpful to include the name of the individual files in the job—we ask that you list the file names first in the job description. Including the file names helps everyone distinguish one job from the others in both the To-Do list and email listings. This is especially important by the time a job gets to a WSG or ATG Editor, since they will be dealing with multiple jobs from multiple POCs. If you have many files in a job, you don't need to list them all—one or two file names is usually enough.

The second item to include in the job description is where to post the job (preview or live site) and any special instructions that need to follow the job all the way to the live site. This reduces the possibility that your files will be posted incorrectly or delayed when an Editor needs to contact you for posting instructions.

Finally, you can explain whether this job contains new files or changes to existing files. This will help your Editor by letting them know what needs to be reviewed. For example, if you say you're posting a new file, the Editor will know he or she should check on whether metadata has been set on the file, and whether all the links work. On the other hand, if all you've done is correct a phone number, the Editor will know that he or she doesn't need to do a complete review of the file.

Some example job descriptions:

- /offices/OCE/filea.html, fileb.html; please post in preview for review. : Updated contact lists in both.
- OESE/oie/contact.html – post to preview only for review – changed layout
- /offices/OSERS/84325.doc; please create PDF and post both files to live site; new grant app
- gpos27.html and gpos27.doc minor changes. replaced links. please move to live site
- URGENT: /PressReleases/07-2001/07152001; please post to live site ASAP; new press release

There are some characters that can't be used in the job description at all; these characters are: ", >, <, and &. (These characters are the ones that require special handling in HTML files, which may help you remember them.) If you use these characters, TeamSite will give you an "invalid workflow" error when you click the Submit button. If you get such an error, you should first check to see if you've used any of those four characters in the job description, and delete or replace them. If you still get an error, you may want to eliminate any punctuation in the description and try again before contacting your WSG Editor or the Helpline for assistance.

Individual file comment

When you submit files for posting, you need to submit an individual file comment for each file. The individual file comment should explain what changes were made to the file. TeamSite keeps all the file comments for each file, so that someone can look at the file history and see all the changes that were made, and when they were made. If you ever need to revert to an earlier version of a file, the file comments will help you decide which version to revert to.

For a new file, you might want to provide a brief explanation of what the file is (for example, "new file listing FY 2001 grant awardees"). For a modified file, you should explain what changes you made to the file (for example, "updated contact info for Illinois").

Results

After you click the **Submit** button, the job description dialog box disappears, and you are returned to a view of your Workarea in the TeamSite window. To see the job you just created, click on the To Do button and select My Jobs from the View menu. You can track the progress of your job from this listing.

The job is now on the To-Do list of the next level editor (for POC Authors, this is the POC Editor). You should get an email about the job you just submitted, listing the file or files you submitted and the job description you provided. Your Editor will also receive a copy of this email, so that he or she knows that a job has been added to the To-Do list.

Once your Editor reviews the file, you'll get an email telling you what action the Editor took. If the Editor approved the file, it gets moved on to the next level of editing, and you'll get an email at each following approval until the file gets moved to the live site (or preview, if that's what you requested). If the Editor rejected the file, you'll get an email telling you the file has been rejected, which means it has been sent back. We explain the entire review process in more detail in the "File Review Process" section of this guide.

Deleting files

Only Editors (POC, WSG and ATG) can delete files within TeamSite; this restriction is imposed by the TeamSite software.

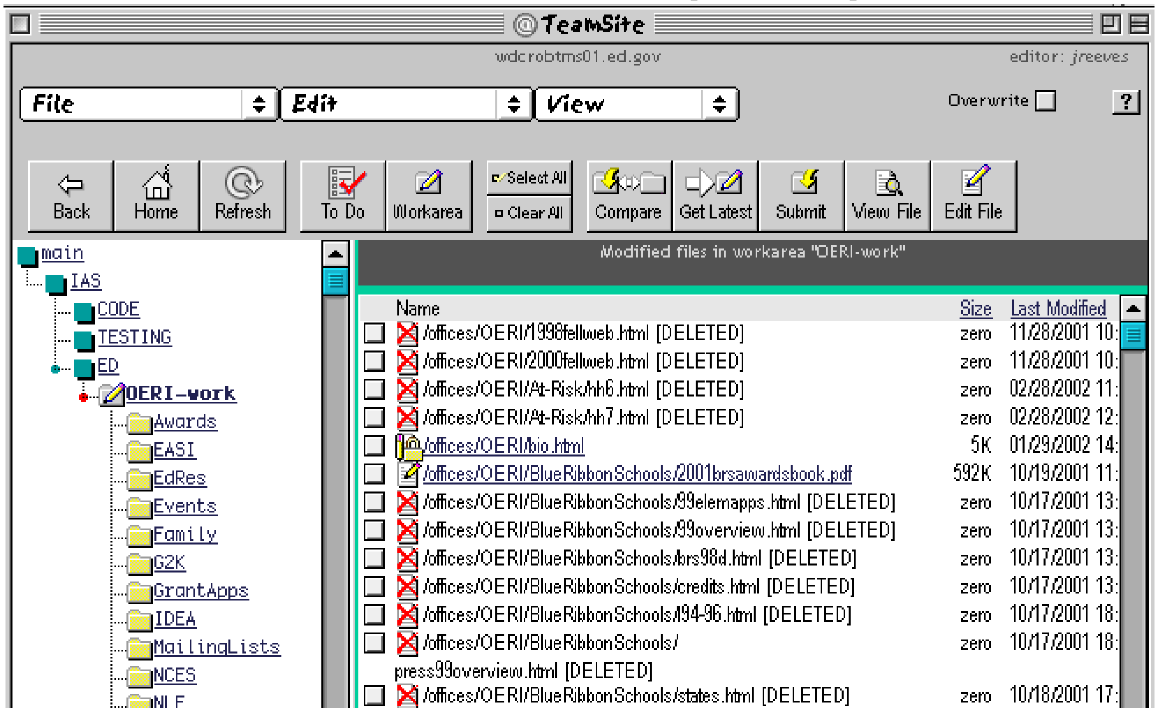
You can't delete files that are locked or files that are in an existing job. If you are deleting a folder, ALL files within the folder must be unlocked and not part of existing jobs. Additionally, you must use the "overwrite" button located in the upper right corner of the TeamSite window or the job will not complete successfully. Because the deletion process can be tricky, it's easy to make a mistake when deleting files; if you're unsure of the steps, you should contact the TeamSite administrator to walk you through the process.

Deleting files from your workarea

After verifying that all of the files you want to delete are not locked and are not part of an existing job, place a check next to each file and select **Delete** from the **File** menu. The files will be removed from the workarea. If you have files to delete from multiple folders, repeat the deletion process until all files are deleted. If the files you're deleting are only in your workarea, you're done. To delete files from the live site as well, you need to take some additional steps.

Deleting files from the live site

Once you've deleted the files from your workarea, select **List Modified** from the **View** menu. This shows all the files in the workarea that are different from the files on the live site; all of the files you just deleted should be listed here. They'll be marked with a red "X" and will have the word [DELETED] next to them.



To delete these files, you need to submit them in the same way you submit new or modified files. Select all of the deleted files and click **Submit**. In the box labeled "Submit Comment," you should list the names of the files you're deleting (or at least one name) and also say "delete from live site." For each of the job details windows below this, you can just paste in the word "delete". When all the comment windows are filled in, click the **Submit** button.

A job will be created and will follow the normal workflow process. Instead of sending edited files to the live site, you are sending the deleted files to the live site, which removes the files from the site.

> **NOTE:** Do not submit deleted files and modified files in the same job, or the job will not complete successfully.

FILE REVIEW PROCESS

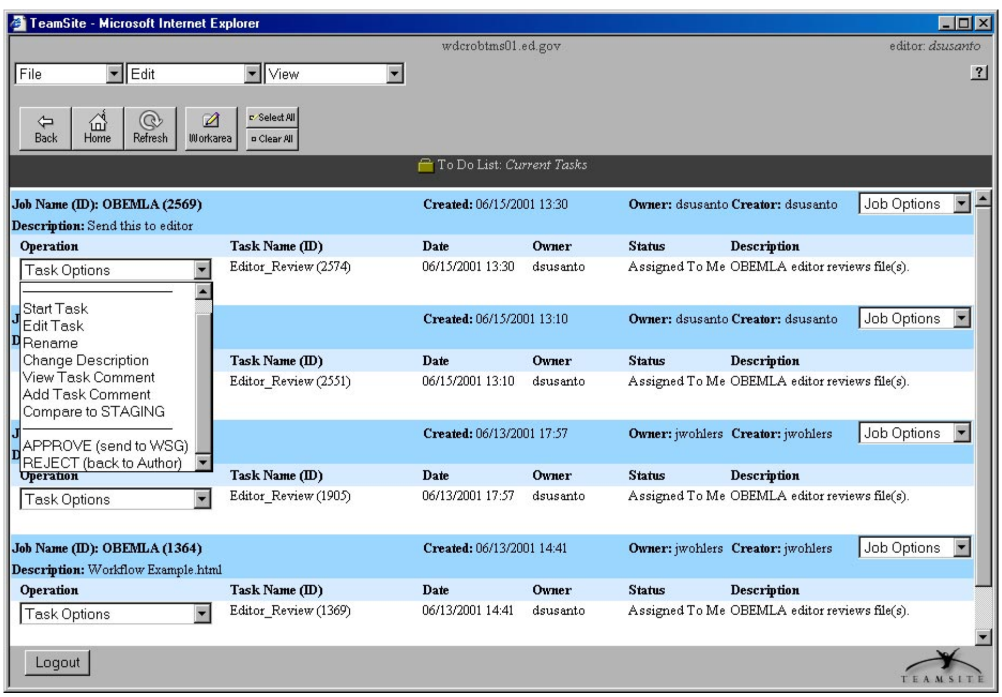
Once a job has been submitted, it gets assigned to an editor. The editor is responsible for reviewing the files in a job and either approving or rejecting the job. When you are reviewing files as an editor, you will be working from your To-Do list in TeamSite, instead of the workarea. Authors will also need to use the To-Do list if their job gets rejected and sent back to them.

Reviewing

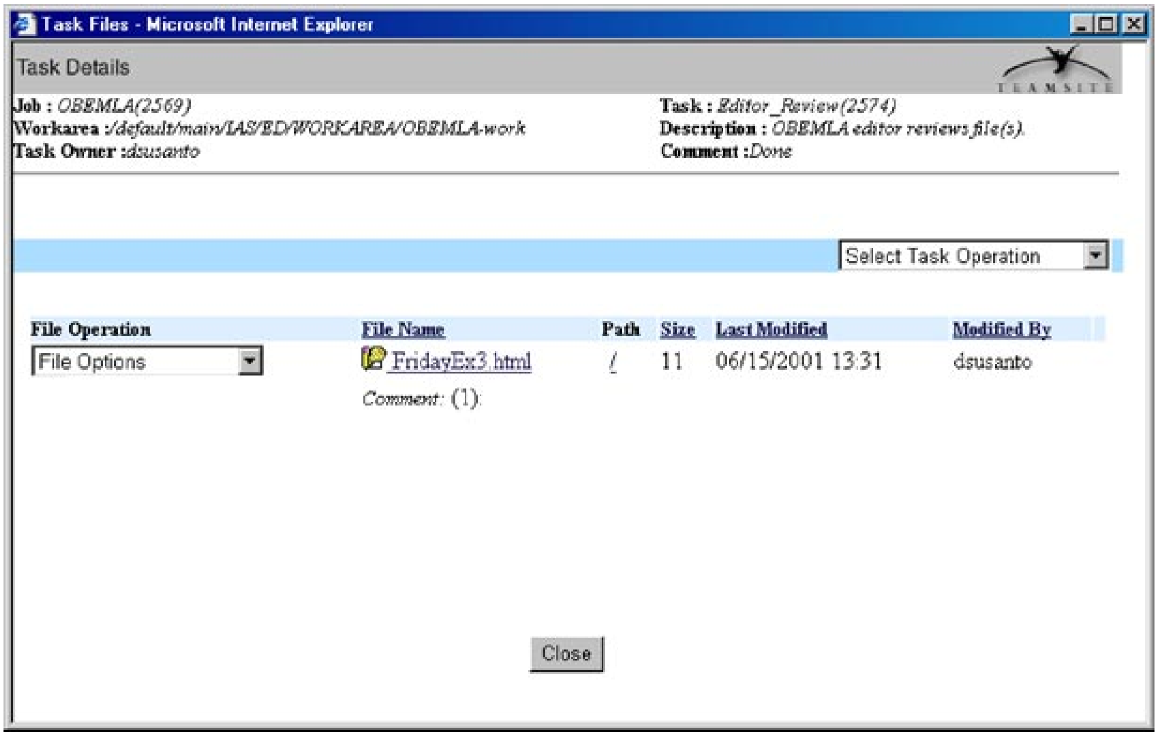
For POC Editors, the To-Do list shows jobs that are assigned to them. For WSG and ATG Editors, the To-Do list includes jobs that are assigned to the Editor group they belong to. In order to work with the job, WSG and ATG Editors first need to select **Take Ownership** from the **Task Options** pull-down menu in the job listing. After that, they can work with the job in the same way that POC Editors do. In the following sections, we'll describe how POC Editors perform the review process. Then under "Review beyond POC Editors," p. 39, we'll discuss the handful of differences for WSG Editors and ATG Editors.

Start the review task

If you are an Editor, the To-Do list shows jobs that are assigned to you for review and approval. To start reviewing a job, go to the **Task Options** menu in the job listing and select **Start Task**.



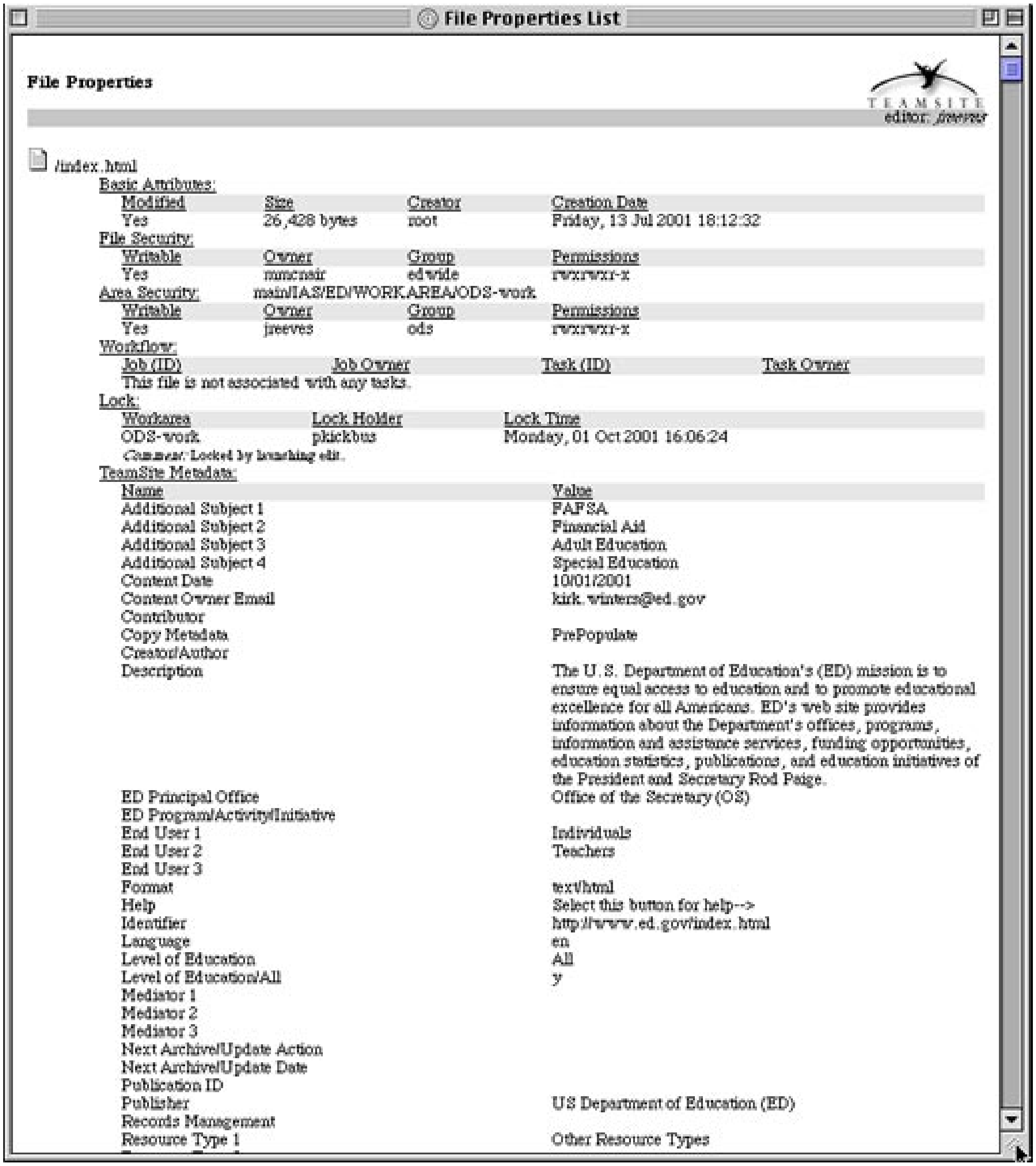
You'll now see a new window, called the "Task Details" window, which lists the files in the job.



Review the files and metadata

To view a file from the job in the browser, just click on the name of the file in the Task Details window. From here you can check on whether the file looks okay in the browser, and be sure that all the links work. You can also use Dr. HTML to check the links, the spelling and the file markup. Dr. HTML is at http://edtest.dsti.com/drhtml/. For information on using Dr. HTML, please see http://www.ed.gov/internal/webtools/index.html

You'll also want to check the metadata associated with the file. In the Task Details window, click on the pop-up menu **File Options** that's next to the file. From this menu, select **File Properties**. You'll now see a window that lists all kinds of information about the file.


File Properties List

File Properties

TEAMSITE editor: jreeves

/index.html

Basic Attributes:

Modified	Size	Creator	Creation Date
Yes	26,428 bytes	root	Friday, 13 Jul 2001 18:12:32

File Security:

Writable	Owner	Group	Permissions
Yes	mmcnair	edwide	rwxrwxr-x

Area Security: main/IAS/ED/WORKAREA/ODS-work

Writable	Owner	Group	Permissions
Yes	jreeves	ods	rwxrwxr-x

Workflow:

Job (ID)	Job Owner	Task (ID)	Task Owner
This file is not associated with any tasks.			

Lock:

Workarea	Lock Holder	Lock Time
ODS-work	pkickbus	Monday, 01 Oct 2001 16:06:24

Comment: Locked by branching edit.

TeamSite Metadata:

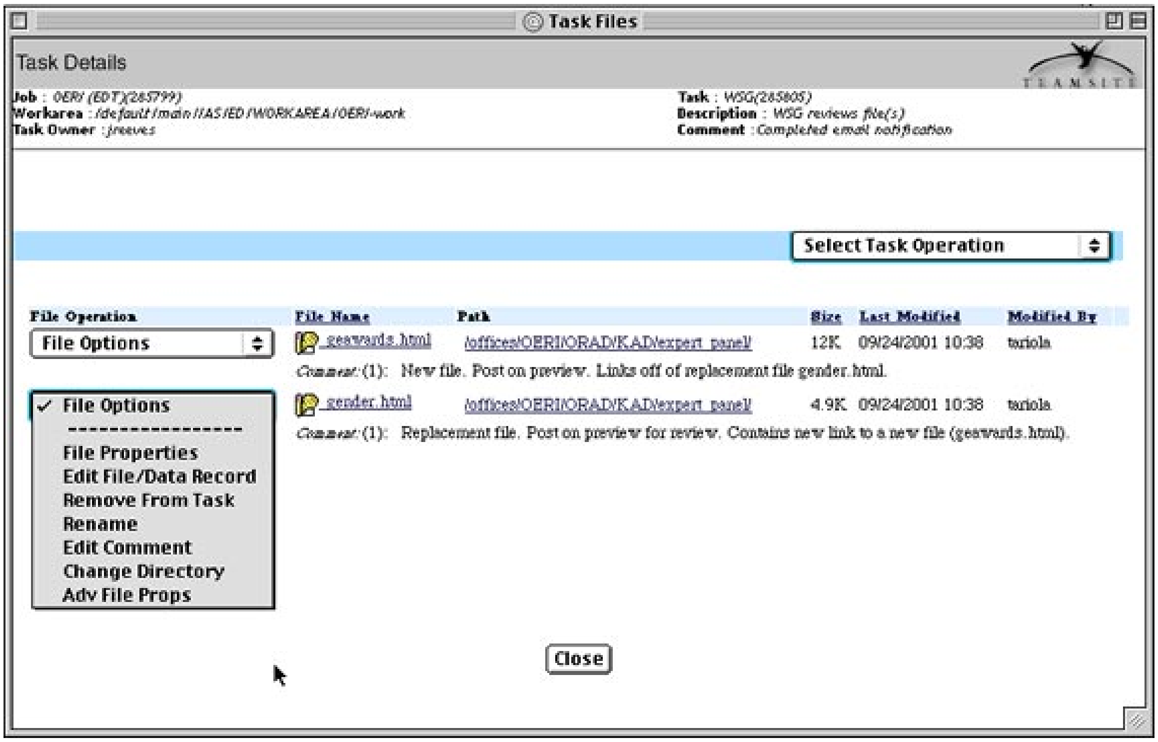
Name	Value
Additional Subject 1	FAFSA
Additional Subject 2	Financial Aid
Additional Subject 3	Adult Education
Additional Subject 4	Special Education
Content Date	10/01/2001
Content Owner Email	kirk.winters@ed.gov
Contributor	
Copy Metadata	PrePopulate
Creator/Author	
Description	The U.S. Department of Education's (ED) mission is to ensure equal access to education and to promote educational excellence for all Americans. ED's web site provides information about the Department's offices, programs, information and assistance services, funding opportunities, education statistics, publications, and education initiatives of the President and Secretary Rod Paige.
ED Principal Office	Office of the Secretary (OS)
ED Program/Activity/Initiative	
End User 1	Individuals
End User 2	Teachers
End User 3	
Format	text/html
Help	Select this button for help-->
Identifier	http://www.ed.gov/index.html
Language	en
Level of Education	All
Level of Education/All	y
Mediator 1	
Mediator 2	
Mediator 3	
Next Archive/Update Action	
Next Archive/Update Date	
Publication ID	
Publisher	US Department of Education (ED)
Records Management	
Resource Type 1	Other Resource Types

At the very bottom is a list of the metadata for the file; the elements are listed in alphabetical order. Check to make sure that the file has adequate metadata. The most important item to check is the identifier; it must be the correct URL for the file. As mentioned previously ("Identifier field," p. 48), the dynamic pages in the redesigned site use the metadata identifier as the URL for links—an incorrect URL for the identifier means those links will be wrong. In addition, you'll want to make sure that the title and description uniquely identify this particular file.

Be sure to review all the files in the job before you move on to the next step.

Modifying files in a job

If in your review you discover a minor problem with one or more of the files, you might want to fix the files yourself and then send them on for posting. If you aren't already looking at the Task Details window, select **Start Task** from the **Task Options** menu in the job listing. Now, to edit the HTML file, select **Edit File/Data Record** from the **File Options** menu next to the file you want to edit. Just like when you edit a file from the workarea, LaunchPad will open the file in your usual HTML editor. Now you can make the necessary changes to the file.



When you're done, save your changes, close the file, and go back to LaunchPad. Select your file and click on **Upload**, and let LaunchPad remove the temporary files. Now you can go back to TeamSite, and view the file again from the Task Details window (remember, all you need to do is click on the name).

You can also rename files from the Task Details window. Select **Rename** from the **File Options** menu next to the file you want to rename. In the window that appears, just type the new name for the file and click **OK**. Now the file will be listed in the Task Details window with the new page. Of course, you should check that changing the file name didn't break any links in the other files in the job.

To edit the metadata associated with the file, you'll need to be in the Workarea view. To go to the correct location in the Workarea, you can simply click the link under the "Path" heading in the Task Details window; the link is right next to the individual file link. Once you're in the Workarea, click in the checkbox next to the file whose metadata you're going to change. Now you can select **Set Metadata** from the **File** menu, and get the metadata form. From here, of course, you can add or change metadata in the usual way. Once you're done setting the metadata, you'll need to go back to the To Do list to continue your review.

> **NOTE:** Metadata only needs to be set once on a file. If **File Properties** shows that the file already has metadata, you don't need to set it again. You'll only need to use **Set Metadata** again if you need to edit the metadata.

If you discover that a POC Author is having recurring problems with his or her files, and you are fixing the same problems over and over, you might want to contact the Author to discuss the problems and how to fix them.

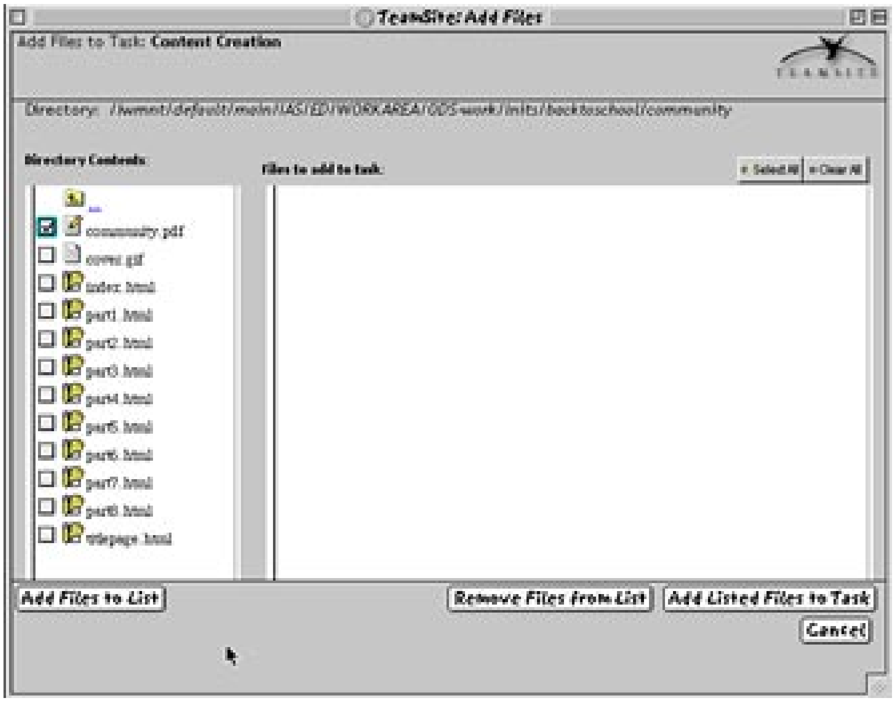
Adding and removing files in a job

Sometimes you may need to remove files from a job. For example, if a POC Author accidentally included a file that wasn't ready for posting in a job with other files, you might want to remove that file so that you can approve the rest of the job. Removing a file from a job is easy. If you aren't looking at the Task Details window, select **Start Task** from the **Task Options** menu in the To-Do list. Then, from the **File Options** menu next to the file you want to remove, select **Remove From Task**. A dialog box will appear asking if you're sure you want to remove the file; click **OK** and the file will be removed from the job. Note that this only removes the file from the job; the file isn't deleted from the site or any of the workareas, and changes made to the file by you or the originator of the job won't be lost.

Adding a file to a job is a little more complicated. First, you need to make sure your file is in TeamSite. For example, if a POC Author submits a Word file for posting and asks you to create and post a PDF to go along with it, you'll need to start by creating the PDF and using **Import Files...** to bring the file into TeamSite. (See "Creating a new file," p. 20, for detailed instructions). Once your file is in TeamSite in the right place, you can go to the To-Do list to add the file to the job.

1. From the To-Do list, select **Start Task** from the **Task Options** menu, and then select **Add Existing File** from the **Select Task Operation** menu.

2. You'll see a new window with a listing of TeamSite folders to the left and a big empty box on the right. You can navigate through the folders by clicking links in the folder listing; the listing starts at the top level of your workarea.



3. Once you get to the folder where your file is, select that file by clicking in the box to the left of the file name.

4. Click the **Add Files to List** button at the bottom left of the window; this copies the name of your file (or files, if you selected multiple files) into the empty box on the right, with a full path listing for the file.

5. Click the **Add Listed Files to Task** button at the bottom right of the window. This will add all the files listed in the box to the job. If you put a file into this listing by accident, you can remove it before you add the files by clicking in the box to the left of the file name and then clicking the **Remove Files from List** button.

6. The file selection window will close, and you'll return to the Task Details window. The file or files you added will be listed here.

7. You will notice that the comment for the file you added just says "File first added to task." You'll want to add a file comment that explains how the file was modified. From the **File Options** menu, select **Edit Comment** to add a file comment (see "Individual file comment," p. 27 for more information on file comments).

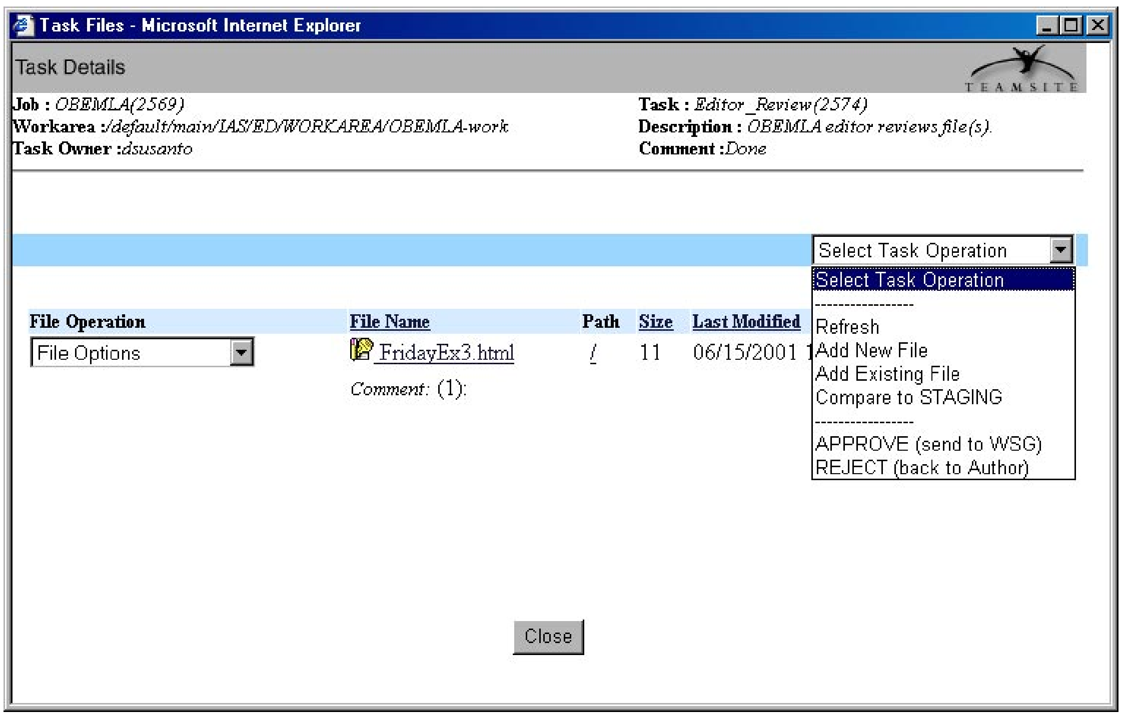
8. A new window will open. In this window, there's a box labeled "Enter new comment for file:" Type your comment here, and then click the **Add File Comment** button to add your comment to the record. Then click the **Close** button to close the window and return to the listing of files. You'll

notice that your new comment doesn't show up yet; you'll need to close the Task Details window and then reopen it (using **Start Task**) to see your new comment.

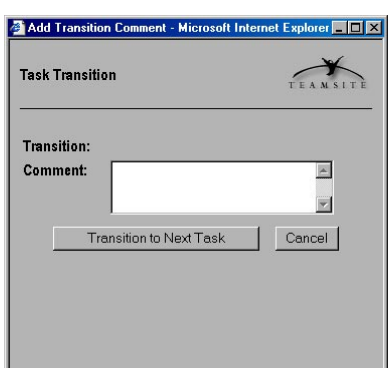
Finishing the task

Approving the job

If your review shows that all the files are okay to post, or if you've made changes to fix the files for posting, you can approve the job. If the Task Details window is still open, click on the **Close** button. You should be looking at your To-Do list again. Select **APPROVE (send to WSG)** from the **Task Options** menu.



After you select **APPROVE**, you'll see a new window that says "Task Transition". This window has space for you to enter a Transition Comment. Although you aren't required to enter a comment, it's a helpful way to provide information to the WSG Editor. In addition, the Transition Comment you enter will be included in the body of the email that gets sent to both the POC Author and the WSG Editor when you approve a job.



If you made any changes to any of the files or to the job, you should explain your changes in the Transition Comment. Because the comment is included in the TeamSite email, you can use it to tell the POC Author or WSG Editor if you've made significant edits to the file or changed the posting instructions. If you made no changes at all, we suggest that you enter a note stating that the job is approved for posting as the Transition Comment.

Whether you enter a comment or not, you can click on **Transition to Next Task** to send the job on. The Task Transition window will close, and you'll be looking at the Task Details window again. You can close the Task Details window now; you'll be looking at your To-Do list again. The job should now be removed from your To-Do list, although you might need to click on **Refresh** to see the list without it.

Rejecting the job for additional work by Author

In some cases, the files may have major problems, or might require additional information from the Author before they can be posted (for example, if it appears some of the text is missing). If in your review you find something you can't (or shouldn't) fix, you can reject the files. The files then get assigned back to the Author for further work.

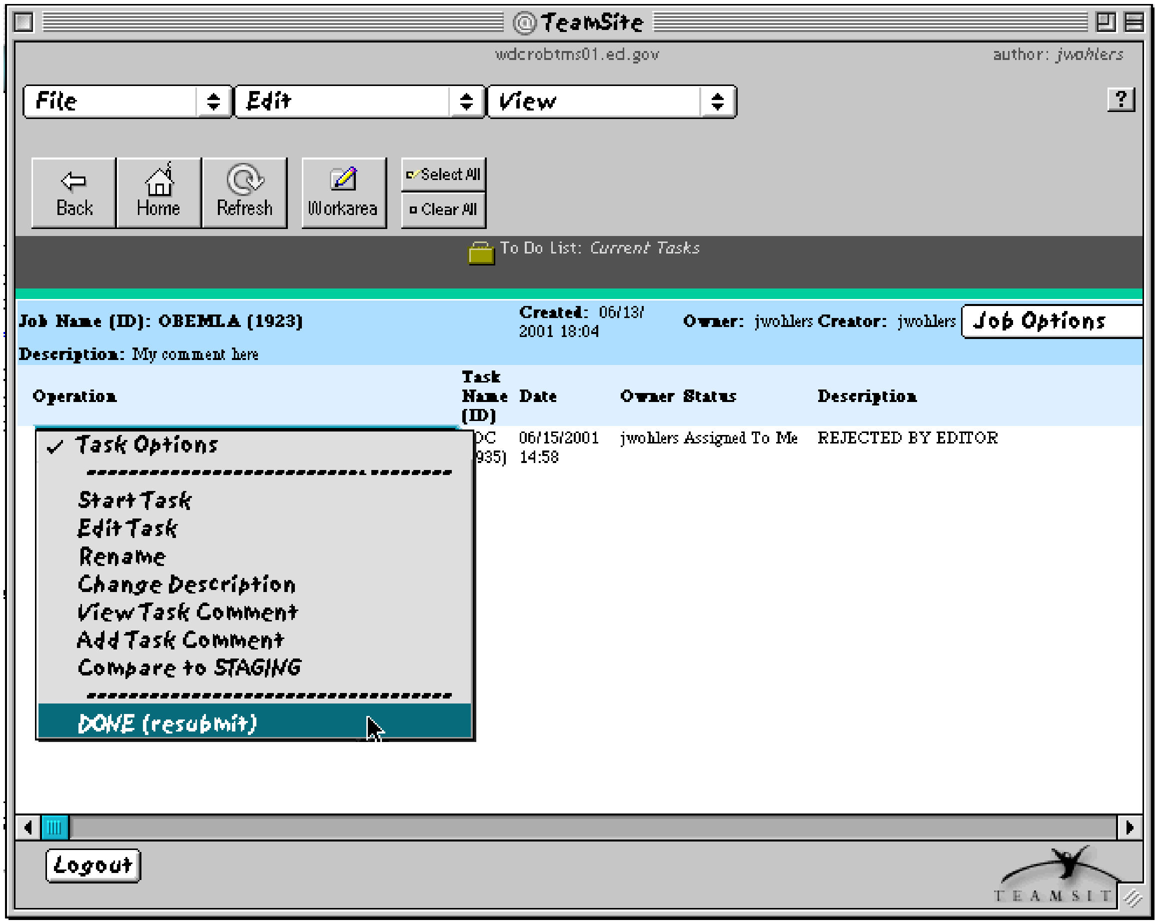
From the Task Details window, you can reject the job by selecting **REJECT (back to Author)** from the **Select Task Operation** menu to the right. You'll then see a Task Transition window, just like the one you see when you approve a file. You need to enter an explanation into the Transition Comment area, so that the author knows what needs to be fixed. Then click on **Transition to Next Task**. The job will be added to the Author's To-Do list and an email will be generated.

The rejected job will also remain on your To-Do list as well, just to remind you that it's still outstanding. You'll notice that each job on your To-Do list has a status; for most, the status will be "Assigned to Me". For these rejected jobs, the status is "Done". You don't need to do anything with the job until the POC Author fixes the files and resubmits the job.

Resubmitting rejected jobs

As we mentioned earlier, an Author will need to use the To-Do list to deal with jobs that have been rejected. If a WSG Editor rejects a file that a POC Editor sent forward, the POC Editor can also edit and resubmit the file from the To-Do list. For both Authors and Editors, the process for editing the file is the same as that under "Modifying files in a job". That is, you use **Start Task** to get to the Task Details window, select **Edit File/Data Record** from the **File Options** menu next to the file that needs to be fixed, and follow the normal LaunchPad editing process. If you need to fix the metadata, of course, you'll need to go back to the workarea. From the Task Details window, you can get to the right folder in the workarea by clicking on the link under the "Path" heading.

Once you've made your corrections to the rejected file, you can select **DONE (resubmit)** from the **Task Options** menu.



Then you'll see the Task Transition window, with space for a Transition Comment. You might want to put some additional explanation in the Transition Comment area for the rejecting editor if your changes were very complicated.

You may notice that the job is still listed on your To-Do list, unlike other jobs that you submit. This is perfectly normal; rejected and resubmitted jobs are treated differently than other jobs. This job will stay on your To-Do list until your editor approves the posting.

NOTE: if your editor rejected a job, **do not** fix the files in the workarea and submit them as a new job. You must resubmit the old, rejected, job. TeamSite won't let a new job with the same files be posted to the live site until the old job has been completed. In addition, you may create a file conflict that will keep the files from posting at all unless both jobs are removed manually.

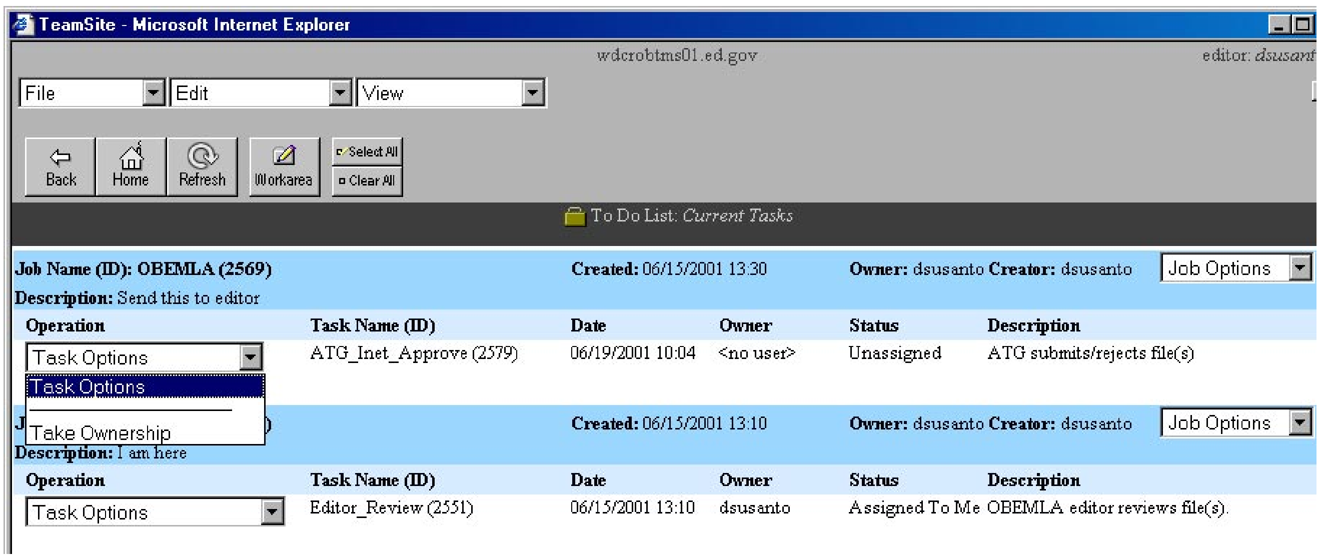
Partial approves and rejects

Although the **Task Options** menu includes the items **APPROVE Partial** and **REJECT Partial**, which were to be used for partial approval and rejection of jobs, these items don't work correctly and should not be used. If you need to approve only some files in a job for posting, you can remove the other files from the job (see "Adding and removing files in a job," p. 34).

Review beyond POC Editors

WSG Editors

As we've said, once a POC Editor approves a job, it gets assigned to a WSG Editor group. This Editor group will be the WSG Editor for that POC, plus two backup Editors. An individual WSG Editor needs to take ownership of the job before he or she can do anything else with it. To take ownership of a job, you can select **Take Ownership** from the **Task Options** menu in the job listing.

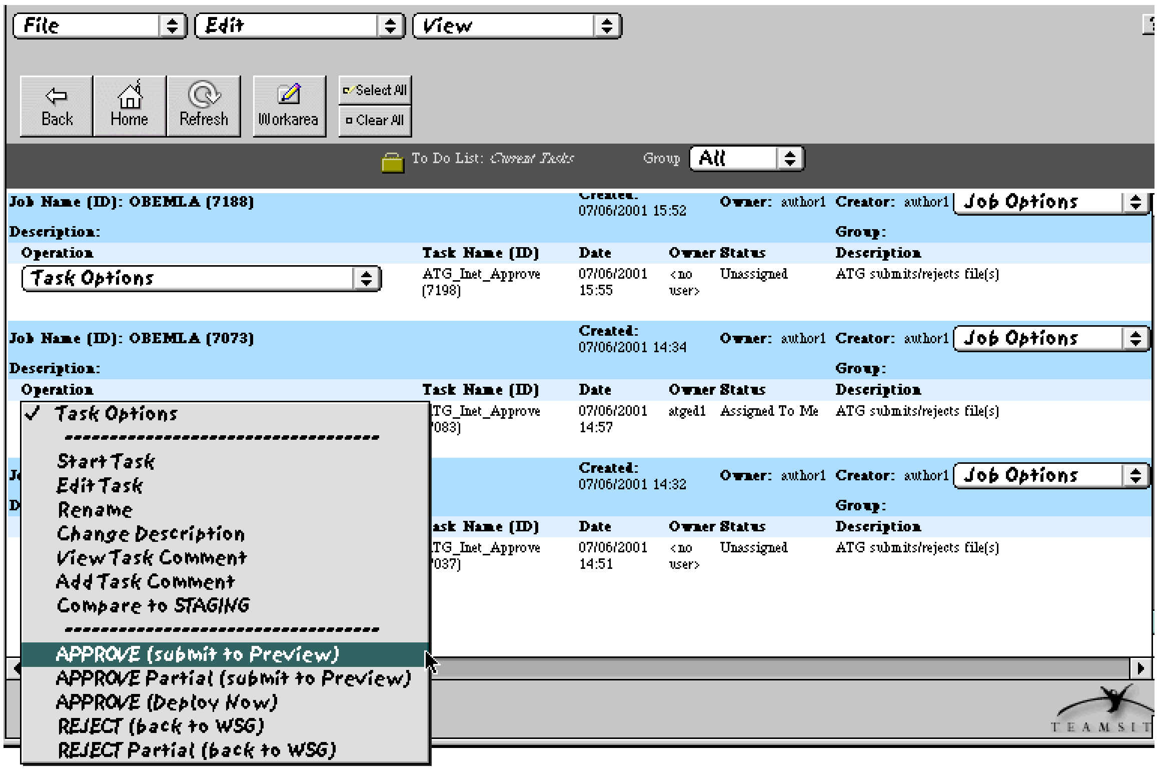


Once a WSG Editor has taken ownership of a job, his or her review options are essentially the same as the POC Editor's. The WSG Editor can approve, edit, and reject jobs, just like the POC Editor does. The only difference is that the names of some of the menu options are different. For example, where the POC Editor can select **APPROVE (send to WSG)**, a WSG Editor would select **APPROVE (send to ATG)**. And for rejecting files, the WSG Editor selects **REJECT (back to POC Editor)** instead of **REJECT (back to Author)**.

ATG Editors

The last step in the workflow is the ATG Editors—they receive the files approved by WSG Editors. Jobs will be assigned to ATG Editors in groups, just like they are with WSG Editors, so ATG Editors will also need to take ownership of a job before they can do anything else. Once an ATG Editor has taken ownership of a job, he or she can review and modify the files in the job in the same way that POC Editors and WSG Editors do.

Because ATG Editors can send files to two different locations (either to the preview site or the live site), they have more options at this stage than the other TeamSite Editors do.



First, ATG Editors have two types of approval. **APPROVE (submit to Preview)** moves the file to the preview site (http://preview.ed.gov) so that the content owner and other responsible parties can review the change. The job stays on the ATG Editor's To-Do list while this review takes place. When the files are ready to be moved to the live site, the ATG Editor can select **APPROVE (Deploy)** from the **Task Options** menu. As you might expect, this moves the files in the job to the live site. Once the files are posted, the job is finally completed and is removed from the To-Do list. An email is sent to the person who submitted the job (as well as any Editors who approved it) letting them know that their files have been posted to the live site.

In some cases, files will need to be posted immediately, without being reviewed on the preview site. The second type of approval, **APPROVE (Deploy Now)**, can be used for such files. This option moves the files to preview and then sends them straight to the live site. Again, the Author and Editors will receive an email letting them know that the files have been posted to the live site.

Second, ATG Editors have an option that will let them stop a job at the preview stage. Some reviews of files in preview take longer than others. For example, an office previewing a site redesign may need several weeks (or longer) to make sure that everyone is able to do a complete review. In such cases, the ATG Editor can move the job off his or her To-Do list by taking ownership, and selecting **End Task** from the **Task Options** menu. If the ATG Editor doesn't do this, then no one else can modify the files or submit them to the live site, for as long as the job is on the ATG Editor's To-Do list. Using **End Task** releases the files, so someone else could move the files to the live site if that particular ATG Editor is on vacation when the POC review is completed.

If the person submitting the job asks that the job be posted to preview, but doesn't specify that it should be held there, ATG will post the job to preview by using **APPROVE (submit to Preview)**, and won't use **End Task** when the job is first posted. However, if ATG doesn't receive posting approval for the job within two weeks, the ATG Editor will contact the creator of the job to see if the job has been approved (or will be approved shortly). If there has been no approval, then ATG will use **End Task** to end the job.

One added complication for ATG Editors is that they must not edit files that have been posted to preview (but not to the live site), for as long as the job the file is in is still on the Editor's To-Do list. Normally, you can edit files in a job on your To-Do list from the Task Details window. However, doing this after the job has been approved to Preview causes a file conflict. If you need to edit the files in such a case, you must first use **End Task** to release the job.

The Author and Editors will receive an email when the ATG Editor selects **End Task** for a job. After the job is ended, the POC Author or any of the Editors can edit the files that were in the job, or submit them as a new job and have them posted to the live site through the normal workflow.

Managing and tracking jobs

There are a few different ways you track the status of a TeamSite job. TeamSite sends you email to help you keep track of a job, but you can also use the To-Do list to get more information about the status of a job.

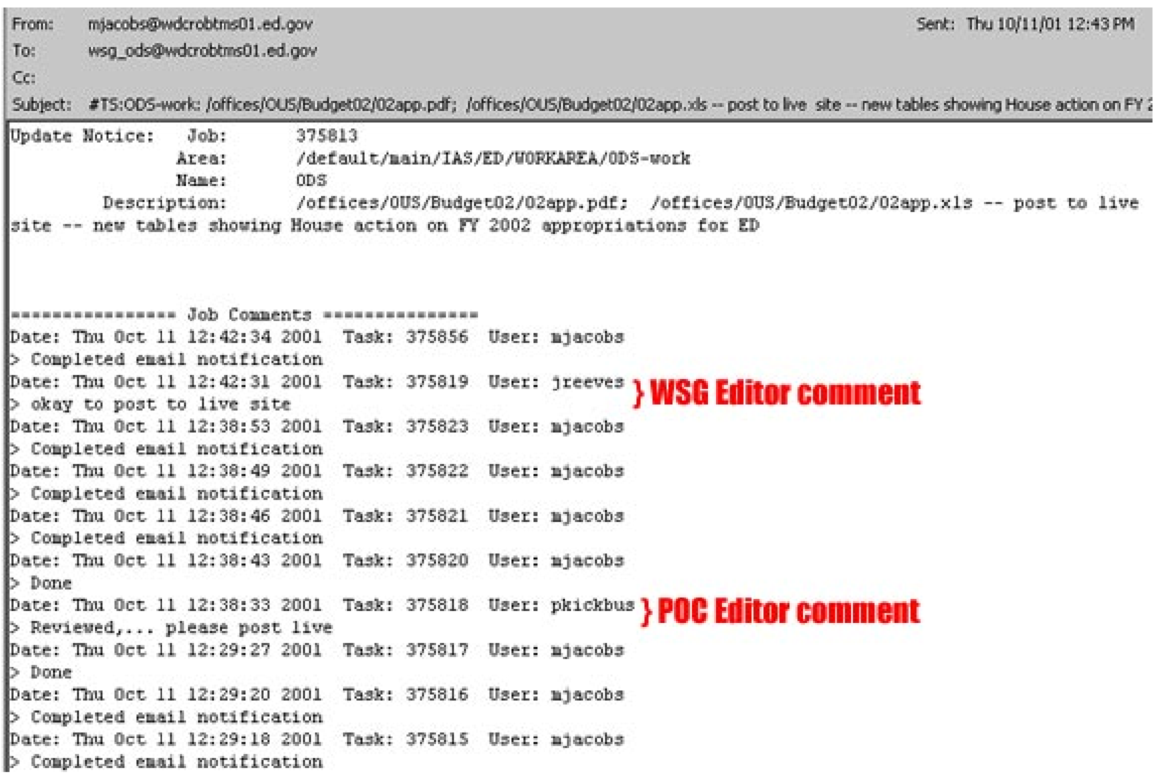
Reading TeamSite email

The email TeamSite sends is automatically generated at certain points in the review process. The way the email is set up can be a little difficult to understand at first, but there are really only a few lines that you'll want to look at most of the time.

First of all, the "From" line in the email always shows the TeamSite userid of the person who started the job. The "Subject" line is always the job description provided when the job was submitted. Therefore, all the emails related to a particular job will have the same subject and be from the same person; you can't tell what step of the posting process the email is about without opening and reading the email.

The first line in the body of the email always has the job number. Every job has a unique number, so you can use this number to identify the job. This can be useful if your Editor is trying to find the job on a To-Do list with a large number of other items.

In the body of the email is a section labeled "Job Comments". This section has comments that TeamSite generates, but also has the Transition Comments added by Editors. For each comment, there are two lines; the first line identifies the date of the comment and the user, and the second line has the actual comment.



```
From:     mjacobs@wdcrobtms01.ed.gov                                   Sent: Thu 10/11/01 12:43 PM
To:       wsg_ods@wdcrobtms01.ed.gov
Cc:
Subject:  #TS:ODS-work: /offices/OUS/Budget02/02app.pdf;  /offices/OUS/Budget02/02app.xls -- post to live  site -- new tables showing House action on FY 2

Update Notice:   Job:         375813
                Area:         /default/main/IAS/ED/WORKAREA/ODS-work
                Name:         ODS
         Description:         /offices/OUS/Budget02/02app.pdf;  /offices/OUS/Budget02/02app.xls -- post to live
site -- new tables showing House action on FY 2002 appropriations for ED


================ Job Comments ===============
Date: Thu Oct 11 12:42:34 2001  Task: 375856  User: mjacobs
> Completed email notification
Date: Thu Oct 11 12:42:31 2001  Task: 375819  User: jreeves } WSG Editor comment
> okay to post to live site
Date: Thu Oct 11 12:38:53 2001  Task: 375823  User: mjacobs
> Completed email notification
Date: Thu Oct 11 12:38:49 2001  Task: 375822  User: mjacobs
> Completed email notification
Date: Thu Oct 11 12:38:46 2001  Task: 375821  User: mjacobs
> Completed email notification
Date: Thu Oct 11 12:38:43 2001  Task: 375820  User: mjacobs
> Done
Date: Thu Oct 11 12:38:33 2001  Task: 375818  User: pkickbus } POC Editor comment
> Reviewed,... please post live
Date: Thu Oct 11 12:29:27 2001  Task: 375817  User: mjacobs
> Done
Date: Thu Oct 11 12:29:20 2001  Task: 375816  User: mjacobs
> Completed email notification
Date: Thu Oct 11 12:29:18 2001  Task: 375815  User: mjacobs
> Completed email notification
```

When an ATG Editor approves jobs, TeamSite generates only automatic comments, and there is no Transition Comment from the Editor. The content of the comments generated by TeamSite will depend on whether the job was posted to Preview or to the live site. For jobs posted to preview, there will be a comment that says "Files Copied To PreviewArea". For jobs posted to the live site, there will be a comment listing the servers the files were deployed to. For example, the comment might begin with "Successfully deployed files to OERI3…"

At the very bottom of each TeamSite email is the list of files included in the job. If the Editor added or deleted files, those changes will be reflected in that list.

Using the To-Do list

The TeamSite email you receive lets you know when certain approval or posting actions have been taken. However, sometimes you'll want more information about a job, or you'll need to find out about someone else's job. For that, you can use the To-Do list.

When you first open the To-Do list, it shows only the jobs that are assigned to you (or, for WSG and ATG Editors, to your editor group). Several items on the **View** menu give you different ways of looking at TeamSite jobs. **Current Tasks** gives you the default view of the To-Do list (i.e., jobs that are assigned to you). For WSG Editors and ATG Editors, **Unassigned Tasks** lists the jobs that are assigned to your editor group, but which no one in the group has taken ownership of yet.

My Jobs list all the current jobs you originated, regardless of who they're assigned to. If you want to find out the status of one of your jobs, this is the view to choose.

All Jobs lists all the jobs currently in the system. This view of the To-Do list can be useful if you're trying to find out the status of a job started by one of your POC Authors, or if you're trying to resolve a posting conflict and need to be able to examine all jobs that might be involved. Usually you'll want to narrow down the set of jobs listed. The pull-down menu at the top of the listing, labeled "Group", will let you narrow the list to only those jobs started in one POC's workarea. The default setting for this menu is **All**. If you want to see only one POC's jobs, just select that POC's initials from the "Group" menu. This pop-up listing works on all the views of the To-Do list, but is most useful, of course, on the listing of All Jobs.

All of the views of the To-Do list provide the same information about the jobs listed. General information about the job is in the listing such as the Owner and the Status. The Owner is the userid of the person the job is assigned to, except that if TeamSite itself is currently doing something with the job, the Owner shows the userid of the person who originated the job. For more detail about the job, you can select **Job Details** from the **Job Options** menu on the righthand side of the job listing. The Job Details listing shows all the actions that have been performed on the job, both those taken by Authors and Editors, and those automatically performed by TeamSite. The action listed at the top is the one that's currently in progress.

Removing jobs

Eventually, you will need to remove a job from TeamSite. Usually, a job gets sent all the way through the workflow, and then the job ends. However, sometimes a job will get stuck somewhere in the workflow, and you'll need to remove it manually and resubmit it. Also, you will need to remove a job if you accidentally submit the same job twice. TeamSite doesn't handle having the same files in two different jobs at the same time very well; at the very least, you'll need to remove one of the jobs to get the files to post.

You can only remove a job you originated. To remove one of your jobs, you need to go to the To-Do list. Select **My Jobs** from the **View** menu. On the righthand side of each job listing is a **Job Options** menu. From the **Job Options** menu for the job you want to remove, select **Remove Job**.

Just like when you delete a file from a job, removing a job doesn't actually affect the files themselves. The files are still on the live site and in all the workareas, and all of your modifications are still there.

When you remove a job, it's generally a good idea to let your Editor know—TeamSite itself doesn't send the Editor any kind of notification.

METADATA

Overview

What is metadata

Metadata as used by the Department of Education is structured data that describes web resources (both web pages and other types of documents). This data can then be used to help in the identification and management of the described resources. Basically, metadata helps us find the right resources; it improves searching. A good example of metadata is a card catalog in a library. Each card contains information that describes a book. Metadata is information that describes each web resource like the card in a card catalog describes each book.

For our website, instead of a card catalog file, we have a database that has all the metadata for all the site's resources. Our search engine can then use this database to help it identify particular kinds of files. HTML files get special treatment; the metadata for the file will be copied from the database into the HTML file itself. The reason for this is that many search engines, including ours, can use the metadata that's placed in HTML files to improve their search results. This will make it easier for people to find ED materials even in cases where the search engine doesn't have access to our database.

If the metadata is going to be useful for identifying resources across the entire site, every resource needs to have the same kinds of information in its metadata. Metadata is broken down into different elements. For example, in a card catalog system, each card lists the title and author of the book described. In that example, title and author are elements. The ED website metadata has several different elements, and we'll discuss how to use these elements in the "Metadata Elements" section of this guide. (More detailed information about the metadata elements is available on the internal ED website at http://www.ed.gov/internal/EDWebMetadata/.)

Why use metadata

On the previous version of the ED website, users could do what is called a free-text search. This kind of search looks for the occurrence of the search terms anywhere in the text of all the Department's web pages. Even if the user tries to narrow the search by using several terms, the search engine is still looking at all the text in all the documents on the site. As the Department's website grows, this type of search retrieves more and more results, with a large number of irrelevant hits, and no guarantee that the best document is listed at the top.

If we apply basic metadata such as a title, content owner, short description, and useful keywords to our web files, users can then narrow their searches and get better results. For example, a user might search for files that have certain words in just the title or the description, or are about a particular subject. This type of search narrowing will reduce the search results list and retrieve the most relevant resources. Getting into the habit of providing good metadata (informative titles, dates, names of authors, and a short concise description) takes a relatively short time and pays off when it comes to finding that resource again.

Metadata will also let us personalize the site for our customers. Personalization lets users control and structure the page by allowing them to pick the types of information they want to see. Metadata will give our site the ability to find that information for them and present it on the personalized page. Personalization will give frequent users easy access to new information, products, and services based on their log-in and the interests they chose on their profile page.

The new website features pages devoted to audience groups and it lists URLs of pages that these audiences might be likely to ask for when they come to our site. For instance, the Students audience page provides a couple of our top sites on Financial Aid, but then the database uses metadata to provide many more pages on financial aid. How does the database create this dynamic page with a list of URLs on financial aid? It looks for specific metadata terms in the database, and then lists the web resources that have those terms assigned to them.

The metadata that the Department is using has been compiled in consultation with leading authorities on metadata, including the World Wide Web Consortium (W3C) and Dublin Core (an organization focused on adopting common definitions and schemes for metadata). Input on the metadata we are using was obtained from the Educational Resources Information Clearinghouses (ERIC), the National Center for Education Statistics (NCES), the Education Resource Organizations Directory (EROD), ED Pubs, from customer searches, and from all offices within ED. Vocabulary lists were created so that everyone in ED would be using the same terms, and so that our metadata would be in synch with our partner organizations and with national standards. These vocabulary lists will evolve over time.

Metadata elements

As we mentioned earlier, we are using a specific set of metadata elements. All of the elements are listed on the metadata form in TeamSite. There are both required and optional elements. On the form, red parentheses and an asterisk [(*)] identify the mandatory fields. The more fields that are filled in with appropriate metadata, the better the resource can be indexed for the search engine, and the more likely it is that customers will be able to find useful resources on their topics.

Required metadata elements	
Identifier	Format
Title	Language
Description	Content Date
Subject	ED Principal Office
End User	Content Owner
Resource Type	

Using the metadata reference

We have a searchable reference for the metadata elements with a large number of terms (for example, Subject and Resource Type). This reference is located at http://www.ed.gov/admin/reference/index.jsp. You can choose to view the listings for a specific element by selecting the appropriate link in the left navbar. You can also view the list of non-preferred terms by selecting the link for it in the navbar; this list shows what term to use in place of the nonpreferred term.

The "Find Terms" search box in the left navbar allows you to search for the term anywhere in the reference (including the non-preferred term list). However, this search doesn't always find all possible results; if you aren't finding the term you want, you should look at the specific element listing instead. Once you're looking at one of the element listings, select **Find** from your browser's **Edit** menu to see if the term you want is there.

The listings for Audience, Resource Type, Program, and Subject are hierarchical, instead of purely alphabetical. In the Program element listing, the grouping is by office, so you can look at only the programs associated with your POC. The other three have the terms arranged into a small number of categories.

You may find these hierarchical listings useful if you have a general idea about your Subject, Audience, or Resource Type, but don't know what specific term you could use. For example, if you know your Audience should include some kinds of teachers, but not all teachers, you can go to the Audience listing in the metadata reference and select the **Teachers** link in the list at the top. This will take you to a list of all the different terms for teachers that can be used for the Audience element.

Once you've found a term you might want to use, you can click on its name to get more information about the term, including a definition and related terms. If the definition you see isn't quite what you're looking for, you can click on the names of related terms to see if one of them is a better match for your resource.

Help

The first field you will see on the metadata form will be an empty text box, with a **Help** button next to it. If you are unsure how to fill out this form, clicking on the **Help** button will bring up a new window with an HTML page that contains this section of the guide. To close the help screen, just click on the **OK** button at the bottom of the page.

Copy Metadata field

The next field on the metadata form has a **Copy Metadata** button. This button lets you copy metadata from another file; see "Using existing metadata in a new file," p. 58 for more information.

Use Preferences field

This field and button will allow you to use saved metadata preferences to populate the metadata fields. Currently, it only fills in the Content Owner and Principal

Office fields, based on your user id. Eventually, we intend to expand the Preferences function to allow you to choose and save preferences for a number of fields.

Identifier field (required)

The "Identifier" field, or URL of the resource, is required. To populate this field with the correct URL, click on the **Copy Identifier** button. This will let you select the file you're working on, and have TeamSite copy the URL.

You must be very careful to provide the correct identifier. All the dynamically generated pages of the redesigned site will use the identifier provided in the metadata as the link for the page. If you've provided the wrong URL in the metadata, then any dynamically generated page will link to that URL instead of to your document, and the user won't get to see your document.

Title field (required)

The next field is the "Title." This title is what appears in the upper left-hand corner of the browser window and is what appears in search result lists. Also, the dynamically generated pages on the redesigned site use the metadata titles of documents as the name for links to the documents. Therefore, the title of any resource should be unique and concise; you need to think about whether someone will be able to distinguish your document from other documents by title alone.

The title can't have more than 255 characters; our database won't accept a longer title. In addition, we recommend that you try to limit your titles to no longer than 65 characters. Most search engines have a limit on how many characters from the title will be displayed in search results; the limits reportedly range from 50 characters to 115 characters. More than 100 characters for a title will rarely be shown in either search results or in the browser window, so you should be sure to keep under that limit, even if you must exceed the 65-character limit.

Some search engines may also ignore any characters above the limit in performing the search itself, so you should be sure that the words that best identify your resource are within the first 65 characters. That means that you'll want to use the most specific words first. For example, if for a multipart document you want to include the name of the document and the individual part in the title of the part, you should put the individual part first to make sure it's within the 65-character limit ("Metadata—TeamSite 4.5.1 Guide" is better than "TeamSite 4.5.1 Guide—Metadata").

Titles for HTML files

In an HTML file, the title is enclosed in the <TITLE> tag in the HTML code. If the title of an HTML file needs to be changed, be sure to change it here in the Set Metadata form; otherwise, TeamSite will simply overwrite any changes you make in the HTML file with the information it has in metadata. To populate this field with the current title from your HTML file, click on the **Copy Title** button. Note if you then edit the title here, TeamSite will overwrite the existing title in the HTML file.

Titles for non-HTML files

For non HTML files, you will need to type in the title; the **Copy Title** button doesn't work. Also, since the dynamic pages of the redesigned site are using the title as link text, you must include information about the format of the file in the title. The preferred method is to add the file format in parentheses at the end of the title. For example, if you have an HTML file with the title "TeamSite 4.5.1 Guide", a PDF version of the same document would have the title "TeamSite 4.5.1 Guide (PDF)", a Word version would have the title "TeamSite 4.5.1. Guide (MSWord)", and a plain text version would have the title "TeamSite 4.5.1 Guide (Text)".

Titles inside PDF and Word documents

As you may know, it's possible to set titles inside PDF or Word documents. These titles don't get overwritten by the "Title" metadata setting. In addition, the search engine will display the PDF/Word title (not the metadata one) for these files in the search results. Therefore, you need to be sure the title in a PDF or Word file is descriptive and useful (making it match the metadata Title would also be a good idea).

To view and edit a title in a Word document, open the file in Word and select "Properties" from the **File** menu. Click on the "Summary" tab if it isn't already selected. The first field you'll see is the Title field; you can type in this field and then click **OK** to change the Title of the document.

The specifications for PDFs for the ED website, provided at http://www.ed.gov/internal/pdfspecs.html, explain how to set the Title for PDF documents (as well as explaining a number of other useful modifications you can make to PDFs); the process is similar to the one used for Word, except that you're looking at "Document Info > General" in Acrobat. You may notice on the PDF specifications page that Department policy requires that several other properties be set: Subject, Author, and Keywords.

Publication ID and Sort Order fields (optional)

Publication ID and Sort Order need to be used together. They are used for multipart items, such as a publication with chapters as separate files, a journal or newsletter with articles as separate files.

Publication ID

"Publication ID" is the identifier given to all parts of the publication (i.e., NCES 99-304). When setting metadata on the sections of a publication, it's important for the publication ID to be identical for all parts (i.e., the table of contents, preface, chapters and appendices will all have the same publication ID).

Generating IDs for web publications

If a web publication doesn't have a publication ID, then one must be generated. A publication ID generator is located at http://edtest.dsti.com/~kma/metadata/PublicationID.html. From the pull-down menus on this page, select the year the document was published and the Office that published it. Then click on the **Request Publication ID** button.

You'll now see a new window that shows the last publication ID used for that POC and year, and the next available publication ID for that POC and year.

The publication IDs generated by this page begin with a W, followed by the initials for the POC, followed by the year and a unique number for the publication. So, for example, WOCIO-2002-0001 represents a publication from OCIO in the year 2002.

You should look at the next available publication ID displayed on the page and make sure it shows the right POC and year. If they are correct, and you're satisfied with the publication ID, then click the **Submit This_Publication ID** button. If you need to change the year or POC, click the **Cancel** button.

To enter the new publication ID into the publication ID field on the metadata form, just highlight the ID on the web page, copy it, and then paste it into the field on the metadata form.

Sort Order

"Sort Order" is typically the order in which the pieces of the publication should be read. If the publication is broken up into a table of contents, a preface, chapters, and appendices, then the table of contents should go first with a "Sort Order" of "1." The preface would be "2," and the chapters would be given successive numbers until each file had been given metadata. "Sort Order" is important because when a user does a search, the resource with the lowest sort order with the same publication ID (usually the table of contents) is the only one that will appear in the results. This means that the user will only receive the most important entry into a publication instead of seeing all 20 sections in the search results, thus rendering the search results less cumbersome and more useful. Following this logic, it will be important for the section of the publication with the lowest sort order to contain links to the rest of the publication.

Creator/Author, Contributor fields (optional)

These fields are meant to identify the people who wrote the content in the document. These fields will be important for publications or research reports, but probably won't be used for many of your routine postings (for example, a listing of the funding opportunities in your POC). For each of these fields, you list the full name of the creator/author or contributor of the document, with the last name first. Semicolons must separate multiple authors or contributors. For example, "Smith, John; Doe, Jane."

> **NOTE:** "Creator/Author" should not be used to assign responsibility for updating/maintaining a page within your POC. Another element that we'll discuss, content owner, should be used for that. (See "ED Principal Office, Publisher, Content Owner," p. 55.)

Description field (required)

The information you place in the description field shows up on search results lists. It will help users figure out if the resource is what they are looking for. Therefore, the description should be short (approximately 150 characters) but informative. Here's an example of a description for the National Center for Educational Statistic's home page: "NCES collects, analyzes and makes available data related to education in the US and other nations."

One important reason for limiting the description to 150 characters is that many search engines only use the first 150 characters of the description. If your description is longer than 150 characters, you'll want to be sure that the first 150 characters adequately describe your document, and that they can stand alone if the search engine discards the rest of the description.

The 150-character limit on the description is a suggested limit, but there's an actual (higher) limit as well. Our database won't accept a description that is longer than 512 characters. If the description you want to use has more than 512 characters, you'll need to edit it to be under that limit before it can be used in the metadata.

Subject field (required)

The subject field tells WHAT the resource is about using keywords or phrases. Use the **Select Subject** button to open a separate pop up window that contains an alphabetical drop down list of all of the possible subjects/topics. Click on the word (or words) that best describe the subject of your resource, and then choose **OK**. Since this is an alphabetical listing, it's possible that the term you need is on the list, but in a different section or combined with another word. For example, "Educational Technology" may describe your resource better than "Technology." However, because the list is alphabetical, these two terms aren't listed together—you shouldn't assume that just because you have found "Technology" and don't see "Educational Technology" that the more specific and better term "Educational Technology" is not on the list. To help you figure out whether the term you want is on the list, you can use the metadata reference at http://www.ed.gov/admin/reference/index.jsp. You can also use this reference to find usable synonyms for terms that aren't in the list of subject terms. (See "Using the metadata reference," p. 46 for more information.)

You can select up to six subject terms to describe your resource, and the more terms and more specific the terms, the better able the search engine will be to narrow a users search. You can't type words that aren't on the Department's vocabulary list into the Subject fields. If you do, you'll receive an error when you try to save the metadata. It's better to select the term from the drop down list instead of typing it, since any difference from the approved list (even an extra space at the end) will prevent the metadata from being copied into the database.

> **NOTE:** When users choose to personalize the ed.gov page, they're given 50 subject terms to choose from in order to define their interests in information from ED. These subject terms are used by the database to show the users resources that interest them. You should be aware of the terms (listed in Appendix B), and use them if they're relevant to your resource. For example, if you have a resource with the subject of "Calculus," you may also want to use the term "Mathematics" since the latter term will allow the resource to be shown to users who express an interest in "Mathematics." You should still include the subject "Calculus" as well, so that the resource will be found by someone searching specifically for "Calculus". Also, please be careful not to use any of these 50 terms if they don't apply to your resource. It's likely that someone who picks "Mathematics" as one of their interests would be unhappy if we pointed them to a publication about teaching reading as a new publication in their area of interest (Mathematics).

If you don't see a term in the list that will describe your resource, and you can't find a synonym for it in the non-preferred list, there are four fields for "Additional Subject(s)." These fields aren't required, and should only be used when the preferred subject terms don't adequately describe your resource. Note that our system won't be able to use these additional subjects everywhere; for example, a user can't use them in personalizing the site. So if you do end up using these, you'll want to be sure you use the best subjects from the predefined list as well.

ED Program field (optional)

The "ED Program/Activity/Initiative" field identifies which program the resource belongs to. Remember that the search engine will look at all the metadata, so if you know your users are likely to use the name of a program in a search, be sure to select that program here. Choose the **Select Program** button beside the text box to open the program/activity/initiative pop-up window. There you can view the list of programs from an alphabetical drop down list. Choose the correct program/activity/initiative by clicking on it, then choose **OK** to populate the text box.

Each program is listed only once in the list, under its official name. If you have trouble finding your program using a particular name (e.g., Pell Grants), you can use the metadata reference at http://www.ed.gov/admin/reference/index.jsp to find it under its official name (e.g., Federal Pell Grant Program). See "Using the metadata reference," p. 46 for more information.

Level of Education field (optional)

Select the educational level(s) of the resource's intended audience by clicking on the appropriate check boxes. Check all the levels that apply. If the resource is appropriate for all levels of education, choose **ALL**. If the level of education can't be determined, even after careful consideration of the resource, choose **Not Specified**.

Audience: End User and Mediator fields (required)

The end user is the intended audience for the resource. For example, one end user for a research report would probably be a researcher. A mediator is a person who may make the resource available to an intended audience (the end users). For example, we might think of students as the end users for an activity book. However, it's likely that a teacher will actually get the activity book and give it to the student. In this case, we can call the teacher a mediator. In completing the metadata form, we'd select "Students" for the end user and "Teachers" as the mediator.

You can use the metadata reference at http://www.ed.gov/admin/reference/index.jsp to look for Audience terms, or to find acceptable substitutes for terms that aren't on the list. See "Using the metadata reference," p. 46 for more information.

Choose the **Select End User** button to open the pop up window that will display the available terms in an alphabetical drop down menu. Choose the term you want by clicking on that term, then choose **OK** to populate the text box. If the resource has a mediator, choose **Select Mediator** to open the pop-up window that will let you select a mediator.

NOTE: When users choose to personalize the ed.gov page, they're given 15 audience terms to choose from in order to define their interests in information from ED. These 15 terms are listed in Appendix B. You should use these terms if they're relevant to your resource. For example, if you have a resource with the audience of "Reading Teachers," you may also want to use the term "Teachers" since the latter term will allow the resource to be shown to users who express an interest in "Teachers." You should still include the audience "Reading Teachers" as well, so that the resource will be found by someone searching specifically for "Reading Teachers." Also, please be careful not to use any of these 15 terms if they don't apply to your resource.

Resource Type (required)

The "Resource Type 1" refers to the nature or genre of the content of the resource. Is the resource a report, an abstract, a yearbook, an animation? Choose the **Select Resource Type** button to open the pop up window that will display the resource terms in an alphabetical drop down list. Choose the best resource type term, and then click **OK** to populate the text box.

You can use the metadata reference at http://www.ed.gov/admin/reference/index.jsp to help you find the correct resource type. The metadata reference provides a hierarchical listing of the resource types (see "Using the metadata reference," p. 46). One of the resource type categories is "Textual Works." Almost every resource we provide should fall into the "Textual Works" category, so if you're having trouble determining the correct resource type, you might want to go to the metadata reference and look at the "Textual Works" category for ideas.

Most often, there will be only one resource type for that resource. If it is highly likely that a customer will search for a resource using two different resource types, then you would choose the "Resource Type 2" field to choose the second possible resource type. An example of a resource that might have two resource types would be lesson plans that are also simulations.

> **NOTE:** When users choose to personalize the ed.gov page, they're also given 26 resource types terms to choose from in order to define their interests in information from ED. You should be aware of the terms (listed in Appendix B), and use them if they're relevant to your resource. The same rules apply to using the resource types terms as applies to using audience and subject terms (see p. 52).

Format (required)

The "Format" field refers to the general appearance of the resource. Is it HTML, PDF, TXT, etc? The default for this field is an HTML document. However, you'll notice that the text in the field says "text/html"; that's the translation of HTML to our metadata format.

If the content item you're setting metadata for isn't HTML, choose the **Select Format** button to open the pop up window. From there, you can choose the format of the resource from the drop down alphabetical list. Once you have chosen the format, click **OK** to populate the text box. The choices will look different in the drop down list compared to the text box. Again, this is because we're translating the items to the format we need to use in our metadata database. For example, if a document is .TXT, then you choose **Text Document (plain)** from the drop down menu, and it will display as text/plain in the text box on the metadata form.

Language (required)

The "Language" field will default to "en" for English. If the content item is in Spanish, choose the **Select Language** button to select Spanish. Click on **OK** to change the language. Spanish is displayed as "es." If the content item is in some other language, please contact your WSG Editor.

Content Date (required)

The "Content Date" is the date on which the intellectual content of the resource was made available in its present form, for example, the date it was created or verified. The date the content was created may be different than the posting date.

After the creation date, the content date should be updated to reflect significant changes to the content. For example, if you have a page that lists funded programs for each fiscal year, you would update the content date when you add the programs for each year. However, you shouldn't update the content date when you are just fixing typos or making non-content related changes (although you should still change the date in any "Last modified…" statement at the bottom of the page). If you think of changing the content date as being like sending someone an email saying that there's something new on that page or in that document, that may help you decide when to update the content date.

In some cases, you'll need to change the content date even though the actual content hasn't changed. If you have a resource that changes very infrequently (for example, once in three years), you may want to review the resource periodically to make sure the information is still up-to-date. When you have verified that the resource is still current, you can change the content date to be the date you verified the information. This will let the system know that the information in the resource is current, even though it hasn't been modified.

The date must be in "MM/DD/YYYY" format.

ED Principal Office, Publisher, Content Owner

These three items designate who is responsible for the resource (which may be different from the creator or author). "ED Principal Office" is the office that owns or is responsible for the content of the resource. Choose the **Select Office** button to open the pop up window with the drop down list of offices. Once an office is chosen, click the **OK** button to populate the "ED Principal Office" field. This field is required.

The "Publisher" field is to be used if the entity responsible for making the resource available is different from the U.S. Department of Education (i.e. a contractor or grantee who works with the Department such as the ERIC clearinghouses when they publish ERIC digests, or when ED publishes a work in conjunction with another agency).

In the “Content Owner” field, enter the email address of the individual who is responsible for updating and maintaining the content and who will be contacted for archiving/updating decisions (ex. Jane.Doe@ed.gov).

Next Archive/Update Date and Action fields (optional)

These two fields are used together to schedule the next content maintenance action to be taken and the date the action should be taken. You would use this if you knew that a particular item should be archived or deleted after a certain date. For example, if you knew that a publication is updated yearly, you could enter information that would cause TeamSite to send you an email about archiving on the date that you expect the new publication to be available. This would allow you to schedule the old publication to be archived when the next revision is available, but to be notified before the archiving just in case the new version isn’t ready when you expect it. To prevent a scheduled archiving or deletion, you need to update the metadata for the file, as we’ll discuss shortly.

Note that when we talk about archiving here, we’re only talking about an addition to the resource’s metadata. Our search engine won’t include these archived items in a results list, unless the user specifically asks to search archived files. Since archived files are still on the live site, the content owner should also place some type of notice in the resource itself identifying the resource or content item as archived information. This can be done by adding a sentence to the top of the page that says, “Archived Information” or by adding some type of text or image that lets users know that the item they are looking at isn’t current.

“Next Archive/Update Date” field schedules the date for the action. Enter the date in “MM/DD/YYYY” format. Note that this date is not the same as the content date; the two will almost always be different. If the only thing you’re doing is scheduling archiving or deletion, you should not update the content date; the content date is only updated when you have made significant changes to the page.

“Next Archive/Update Action” lets you pick the action to be taken on the date you selected. It has five values to choose from. Click on the **Select Action** button to choose one of the following actions from the pop up window:

1. Contact Owner before Archiving: Two weeks before the action date, the content owner is contacted by email and notified that item will be archived (that is, kept on the website in archival status and not returned in searches unless the searcher asks for archives). If the content owner doesn’t change the action or date, the item is archived on the action date. Thus, to prevent the archiving, you’ll need to update the metadata for the resource. The document with the new metadata must be posted to the live site before this change takes effect. Since you’ll have two weeks notice, that should allow you plenty of time to make this change, but you shouldn’t wait until the last minute, or your metadata change might not make it through the posting process in time to prevent the archiving.

2. Contact Owner before Deleting: Two weeks before the action date, the content owner is contacted by email and asked to confirm that the item should be deleted (removed completely from the website). If the content owner doesn't change the action or date, the item is deleted on the action date. Owners who want to keep a copy off-line must make their own arrangements. Again, remember that to prevent deletion, you need to get the document with revised metadata posted to the live site. Be sure to allow enough time for the posting process, or your document may be deleted as originally scheduled.

3. Contact Owner to Validate or Update: Two weeks before the action date, the content owner is contacted by email and asked to validate the content of the item. By "validate," we mean that the content owner should determine whether the information is still current, and make any necessary changes. If the content owner doesn't respond or change the action or date, the item is archived on the action date. The item is restored to active status after the owner validates the item (and updates or corrects as necessary). You'll want to update the content date for the item to be the date you validated the information (see "Content Date," p. 55).

4. Archive Item Automatically: The item is automatically archived on the action date (kept on the website in archival status and not returned in searches unless the searcher asks for archives). The content owner is notified by email when archiving occurs. You can also use this item if you want the resource to be archived immediately. Just choose "Archive Item Automatically" and set "Next Archive/Update Date" to be yesterday's date. (Remember, don't update the content date just because you're archiving the file. Leave the content date alone unless you've made significant changes to the content of the page.)

5. Delete Item Automatically: The item is automatically deleted on the action date (completely removed from the website). The content owner is notified by email. Owners who want to preserve a copy off-line must make their own arrangements.

Once you've chosen an action, click **OK** to populate the text box.

Status field

The "Status" field is used by TeamSite to keep track of whether an item is archived. Do not enter, delete, or edit any information in this field. If you want a resource to be archived, use the "Next Archive/Update Action" and "Next Archive/Update Date" fields to schedule an archiving.

Rights Management field (optional)

The "Rights Management" field will be used to identify information about a resource's rights status (fee/free, copyright status) or the URL of the owner's copyright statement. The default value for this item is "Free, No Restrictions". This will be correct for most Department resources. However, some items produced by contractors or grantees may have more restrictive distribution or copyright statements. That information should be provided in the resource, and you can copy that information into the "Rights Management" field, or use the URL for the file containing the copyright statement. If you aren't sure (and can't find out) whether something can be freely distributed, please remove the default value and leave this field blank.

Records Management, Sensitivity/Privacy fields

"Records Management" and "Sensitivity/Privacy" are fields we expect to use in the future. For now, you can ignore them.

Setting metadata on multiple files

If you have a new publication or several similar new files that need metadata, there's a way to set metadata for the files that will let you avoid repetitious work. Once the files are in your work area in TeamSite, select all of the files that are similar, and then choose **Set Metadata** from the **File** menu. This will bring you to the same form you use for setting metadata on one file.

You'll see that there's a list of files on the left side of the page that shows all of the files you have selected. You can copy the title from the first file checked by clicking on **Copy Title**. This way, if the individual titles are all variations of the same title, you won't have to make many changes. Go down the form and fill in the information that's the same for all of the files (i.e. author, subjects, audience, content owner, etc.). Once you've filled in all of the similar fields, click on the **Switch to File View** button at the bottom of the form. This will bring up another metadata form that shows all of the metadata for the selected files individually—the items you filled out on the first metadata form will be filled in for each file here. On this new form, you need to make sure that metadata is entered that is unique to each file (i.e. identifier, title, sort order, etc.). It's important that you make sure that the correct URL is entered for each file, and that each file has a UNIQUE title. Go through each file to make sure that the metadata for that file is correct. Once you've finished filling in the metadata, choose to **Verify Entries** and then **Set Metadata**. Now you can submit the group of files normally.

Files with existing metadata

Previously, TeamSite would delete existing metadata on a file if you tried to set metadata on that file in a group with other files. Now, you can set metadata on multiple files even if one or more of the files has existing metadata, but you must be careful when doing so, because it is possible to accidentally erase some of the existing metadata while you're making changes.

If you set metadata on multiple files as described above, and the files have existing metadata, you may see data in someof the fields when the metadata form opens. For any fields where all the files have the same information, that information will be displayed on the form. For example, if all the files you select belong to one publication and have the same publication ID, you'll see that publication ID when the metadata form opens. If the files have different information for any field, that field will be left blank. Note that the title and identifier fields will generally be blank on this first page of the metadata form, because they should be different for every file

You can make changes to the metadata on this page; any changes you make will be applied to every file in the group. If you make changes to an item that is blank only because the selected files have different information for that field, you will overwrite any existing (different) information for that field and give all the files the same information for that field. For example, if the description field is blank because one file has a description and the other doesn't, entering a new description on this page will give both files the same description (and the existing description for the first file will be lost). Therefore, you need to be very careful when editing blank fields at this point to be sure you don't overwrite information you want to keep.

Once you've made any global changes you want to make, you can click on the **Switch to File View** button at the bottom of the page to see the information for the individual files. For items that were blank because files had differing metadata, the existing metadata for those fields will now appear, unless you overwrote it on the previous screen. From here, you can make any individual changes and verify and set the metadata as usual.

Using existing metadata in a new file

If you have a new file that's similar to another file that already has metadata, you can use the metadata from the existing file to prepopulate the fields in the metadata form. This is where you use the **Copy Metadata** button that we mentioned earlier.

1. Select the file you want to add metadata to, and select **Set Metadata** from the **File** menu. This opens the metadata form.

2. Click on the **Copy Metadata** button. This will bring up a pop-up window that will allow you to browse for the existing file. The window will initially list all the workareas as links; click on the link for the workarea you want to copy from. You will then see all the folders on the site listed as links—you can continue to navigate through the site folders by clicking on the links.

3. When you get to the right folder, you can select the file that you want to copy from by clicking on the button next to the file name. Then click the **Select File** button at the bottom of the page.

4. A new window will be displayed that gives information about the file you selected. Click on the **Set Values** button to copy the metadata from the file you selected into the metadata form. This will prepopulate the fields on

the metadata form with the information that was used in the file you just selected, and the new window will close.

5. You should now be looking at the metadata form again. Go through the form to change the items that should be different than what was copied (e.g, identifier, title, add different subjects, etc.). Then choose to **Verify Entries**. When the entries verify, you can click on the **Set Metadata** button.

APPENDIX A—HELPFUL CONTACTS

TeamSite Help Resources

General Teamsite Information **Author/Editor Designations** **Training Coordination**	Paul Horn Paul.Horn@ed.gov (202) 401-3968
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APPENDIX B—PERSONALIZATION TERMS

50 Subject Terms

Accountability
Adult Education
Bilingual Education
Budgeting
Career Planning
Charter Schools
College Preparation
Compensatory Education
Disabilities
Disadvantaged
Discrimination
Early Childhood Education
Educational Assessment
Educational Facilities
Educational Improvement
Educational Research
Educational Technology
Elementary Education
Employment Opportunities
Equal Education
Evaluation
Family Involvement
Gifted
Grants
Instructional Materials
International Education
Literacy
Mathematics
Migrant Education
Partnerships in Education
Postsecondary Education
Private Education
Reading
Rehabilitation
School Choice
School Readiness
School Reform
School Safety
Sciences
Secondary Education
Service Learning
Special Education
Standards
State Aid
Statistics
Student Financial Aid
Student Loan Programs
Teacher Education
Teaching (Occupation)
Testing
Vocational Education

15 Audience Terms

Administrators
Community Groups
Contractors
Counselors
Grantees
Librarians
News Media
Parents and Families
Policymakers
Principals
Researchers
School Support Staff
Student Financial Aid Officers
Student Financial Aid Providers
Students
Teachers

Note: Some don't exactly match redesign audience tabs.

26 Resource Types

Announcements
Application Materials
Books
Budget Materials
Calendars
Data Collection Instruments
Datasets
Events
Instructional Materials
Legislative Materials
Organizations
Pamphlets
Persons
Policy Guidance
Press Releases
Professional Development Resources
Reference Materials
Regulatory Materials
Reports
Serials
Services
Speeches and Testimony
Standards and Curriculum Frameworks
Tests and Evaluation Instruments
Video Recordings
Websites